CAPITA

Murton Gap – Killingworth Moor
Retail requirements assessment

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Introduction

Project Background

The purpose of this project is to highlight a preferred scale and suggested locations for potential retail provision on the suggested Strategic Allocations of Murton and Killingworth Moor, to inform ongoing options analysis in preparation of a Concept Framework for both sites.

Both Murton and Killingworth Moor have been identified as suggested allocations within the North Tyneside Local Plan Consultation Draft 2015, as key strategic sites to contribute towards the borough's objectively assessed needs for housing provision that will deliver some 5000 new homes and approximately 17ha of employment space (at Killingworth Moor). Ensuring development at both sites create safe, sustainable and attractive places for existing and future residents to live is therefore of crucial importance to the future of North Tyneside as a whole.

This requires a thorough and robust understanding of the need for all infrastructure, services and facilities on the site including the needs for new school provision, open space, transport provision including new public transport provision, and retail, health and community facilities.

For both of the sites, the potential requirement for a new local centre has been identified. Such a centre(s) would provide an important focal point and sense of place for future communities at Murton and Killingworth Moor.

This study outlines the needs and requirements for new local centres and retail provision. The brief extends the potential input beyond the basic policy requirements for such provision set out within the Local Plan and will provide a detailed, justified assessment of the identification of new local retail provision.

Project Outline

1 - Review existing available Borough wide evidence
2 - Review of retail provision at other major development sites
3 - Calculate the total retail need arising from each Strategic Allocation for convenience and comparison floorspace
4 – Analysis of Retail Hierarchy - The broad zones of influence / catchment of each existing
5 - Identify and appraise each existing centre that could potentially provide for the needs of each Strategic Allocation
6 – Establish the requirements for new retail provision at each Strategic Allocation
7 – Conclusions, impact assessment and sequential test

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1. Review existing available Borough wide evidence

1.1 This initial stage provides the overarching context for new shopping provision and a local centre at the suggested Strategic Allocations in North Tyneside. This will consider the local and national policy context for retail provision and creation of new centres, and address existing sources of evidence including:

- The Retail and Leisure Capacity Study Update 2014, PBA
- The Retail and Leisure Study 2011, Roger Tym and Partners
- Retail and Regeneration Strategy – District Overview 2010, Arup
- Town and District Centres – Position Statement 2010, Arup
- Town Centre Vacancy Data for the last five years

1.2 This analysis and review will enable subsequent assessment of the role and implications of growth at Murton and Killingworth Moor and inform projections of retail needs arising specifically from these strategic sites.

Context

1.3 North Tyneside is one of five metropolitan districts within the Tyne and Wear conurbation. It has the North Sea to the east, the River Tyne to the south. Newcastle City forms the western boundary whilst Northumberland County is to the north. The Borough is bisected east/west by the A19 (T) and north/south by the A1058 Coast Road. The Coast Road provides a direct route through to Newcastle city centre, whilst the A19 goes north to join with the A1 at Northumberland and south through the Tyne Tunnel to provide a route through the North East region to North Yorkshire.

1.4 The borough has no single main centre. Instead it includes the four town centres of Wallsend, North Shields, Whitley Bay and Killingworth. The first three centres have varying issues related to physical decline but they have benefitted from recent investment. There are a number of District and Local Centres associated with residential areas.

1.5 Newcastle City Centre and the Metro Centre in Gateshead have an impact on retailing in North Tyneside whilst within the Borough, the out-of-centre retail is focused on the Silverlink Retail Park at the junction of the A19(T) and A1058 and also at Royal Quays, close to the Port of Tyne. Major supermarket operators are well represented and there has been an increasing presence of discount supermarkets in the Borough.

1.6 In delivering the Borough's requirements for development the proposed strategic allocations of Murton and Killingworth Moor will create notable new areas of development and provide for a significant proportion of the anticipated growth in North Tyneside to 2032.

1.7 Both suggested sites lie to the north of North Tyneside with Killingworth Moor to the west of the A19(T) and Murton to the east. The sites are consequently most closely related to Killingworth town centre and Whitley Bay town centre. Existing local / district centre provision in this area is provided at Northumberland Park which lies roughly between the two strategic allocations.

National Policy

National Planning Policy Framework

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

1.9 The NPPF makes clear that there should be a presumption in favour of sustainable development, paragraph 14 states that 'At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision taking'.

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

1.11 Paragraph 18 of the NPPF confirms that the Government is committed to securing economic growth in order to create jobs and prosperity. To this end the planning system should encourage and not act as an impediment to sustainable growth.

1.12 Paragraphs 23 to 27 of the NPPF are of particular relevance to town centre planning and advocates a 'town centres first approach', stating that planning policies should positively promote competitive town centre environments.

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

1.14 Applications for 'town centre uses' outside defined centres which are above 2,500 sq.m (or a locally-set threshold, which for North Tyneside is 1,000sqm gross convenience and 500sqm gross comparison retail floorspace) must also submit an impact assessment, to assess the impact of the proposal on existing, committed, and planned investment in defined centres in an appropriate catchment area, as well as the impact on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area. The NPPF is clear that where a planning application cannot demonstrate compliance with either the sequential or impact 'tests', it should be refused planning permission.

National Planning Practice Guidance

1.15 The NPPG was launched by the Government on 6th March 2014 as an online resource to streamline and consolidate over 7,000 pages of previously complex, and often repetitive, supporting guidance and this online resource is the formal supporting documentation to assist in implementing policies set out in the NPPF.

1.16 The section on 'Ensuring the vitality of town centres' provides further guidance on paragraphs 23 to 27 of the NPPF. The guidance is structured around three key aspects of planning for the vitality and viability of centres, namely: the strategic vision and management; the sequential test; and the impact test.

1.17 The NPPG sets out the need to support town centres in generating local employment, to promote beneficial competition within and between centres, and to create attractive, diverse places where people want to live, visit and work. This should be done by planning to meet the needs of main town centres uses in full, whilst adopting a 'town centre first' approach.

Regional Policy

Strategic Economic Plan priorities and Local Enterprise Partnership objectives

1.18 Increasingly the North East Local Enterprise Partnership provides a joint approach for the seven Local Authorities of North Tyneside, Newcastle, Gateshead, South Tyneside, Sunderland, Northumberland and Durham. The potential opportunities provided by close working relationships between the authorities in the creation of a North East Combined Authority (NECA), will have an important strategic role influencing particularly the economy, skills and transport across the area.

1.19 The North East Strategic Economic Plan (SEP) was submitted to Government on 31st March 2014. It is founded on research and evidence of the strengths of the North East economy and the opportunities that exist for economic growth, including research carried out for and the recommendations of the North East Independent Economic Review chaired by Lord Andrew Adonis.

1.20 The SEP sets out a long term economic plan for the LEP area to 2024 and sets the overarching vision to deliver 60,000 private sector jobs and provide over one million jobs in the North East economy by 2024. The SEP recognises that investing in places supports sustainable growth and housing delivery is an integral part of the future growth strategy. Good quality and connected housing in the right places is seen to be essential for creating sustainable communities which attracts and retains economic investment and skilled workers.

Local Policy

The Unitary Development Plan and emerging Local Plan

1.21 In North Tyneside the current development plan is the Unitary Development Plan 2002 (UDP). Current UDP policies are "saved" and, as far as the UDP conforms to the NPPF, will continue to form the basis for planning decisions until completion of the Local Plan.

1.22 Paragraph 156 of the NPPF states that Local Planning authorities should set out the strategic priorities for the area in the Local Plan, including policies to deliver 'the provision of retail, leisure and other commercial development'.

1.23 The Council is committed to producing a Local Plan setting out a complete set of proposals and policies for the entire borough with a single Plan. Previously, work started on a borough wide Core Strategy containing very high level policies as well as three geographically specific Area Action Plans for North Shields, Wallsend and the Coast.

1.24 The latest version of the Local Plan covers the growth requirements for North Tyneside, identifying how many homes and jobs will be generated by 2032. These growth projections are based on economic forecasts and market signals with evidence on future household and population projections. This evidence and site survey analysis has determined a range of sites to provide for the Boroughs growth.

1.25 Two of the significant housing sites within the draft Local Plan are Killingworth Moor and Murton. These two sites have been identified as potentially accommodating some 5,000 homes between them; a maximum of 2,000 homes and 17hectares of employment land at Killingworth Moor and a maximum of 3,000 homes at Murton.

1.26 The draft Local Plan (February 2015) provides specific policy for the two suggested strategic allocations at draft policy AS7.4 Strategic Site Allocations. This proposed policy sets out that the Council anticipates the delivery of 4,500 homes at:

a. Murton - allowing for future master-planning to establish the specific capacity and layout of the site provision for a maximum of 3,000 homes; and
b. Killingworth Moor - allowing for future master-planning to establish the specific capacity and layout of the site, provision for a maximum of 2,000 homes sites.

1.27 The policy then proposes that new local facilities will be provided at new designated centres on both sites, with major additional comparison retail needs supported by expansion of Northumberland Park District Centre, set out at Policy AS6.9 Northumberland Park District Centre Retail Development.

1.28 To support sustainable development as a whole within the Borough, the Plan supports the provision of small scale local facilities out of centre, which could support local communities in appropriate retail and leisure uses, without having a significant impact on nearby centres recognised in the Centres Hierarchy. This proposed policy (DM6.11) sets out that Small-scale out of centre facilities serving local retail and leisure needs of less than 500 sq.m gross floorspace, or extensions to existing facilities, will be permitted if it can be shown that all of the following requirements are met:

a. The proposal is of an appropriate size and function to meet specific day-to-day needs of a neighbourhood population within convenient, safe walking distance (300m);
b. It will not have an adverse effect on the amenity of neighbouring uses;
c. Contribute to social inclusion and sustainable development;
d. Safeguard the retail character and function of existing centres and not detract from their vitality and viability. Proposals to meet the day to day needs of employees on employment sites would be subject to this policy.

1.29 In addition draft Policy S10.13 Community Infrastructure recognises the importance of community facilities serving more localised neighbourhood catchments and proposals for the loss of such facilities are covered in that policy.

1.30 This study will provide additional evidence to enable to Council to define its specific requirements for provision of small centres at each site.

1.31 Alongside the growth in households is the subsequent growth in retail spending. The draft Local Plan has a clear objective to support its town centres by focusing new retail, leisure and other main town centre uses into existing centres. It also allows for appropriate new local provision made in association with new residential development and there is an acceptance that the two significant sites of Killingworth Moor and Murton will accommodate retail as part of their development. It is recognised that the scale of development proposed on both sites will require a range of facilities and amenities to create attractive and sustainable places with potentially new designated centres.

1.32 The draft Local Plan includes a series of policies covering future provision of retail needs within the borough, which is based on the evidence provided by the Peter Brett's Retail and Leisure Study update (2014). The draft Local Plan also includes a series of policies with associated criteria that will be used by the Council to assess town centre proposals in and out of designated centres.

Local Plan Evidence Base

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

1.34 The Council recently commissioned an updated Retail and Leisure Study (2014) that replaced the 2011 study with updated growth projections and reflecting the changing economic conditions post recession. The Study calculated the projected retail need by convenience goods sector and the comparison goods sector. It also assessed the future leisure needs within the period of the Local Plan.

1.35 The work of Peter Brett's Retail and Leisure Study drew upon the vacancy monitoring of North Tyneside Council that provides a consistent data set reflecting the changing picture of the town centres over a number of years. This data alongside footfall counts in Whitley Bay, Wallsend and North Shields provides and overview of the health of the centres within North Tyneside.

1.36 Prior to the Peter Brett's study the Council had previously commissioned Ove Arup to draw up a report of regeneration priorities for North Shields and Whitley Bay town centres. This report recommended a series works that would help revitalise the town centres and increase the vitality and vibrancy of each centre, prioritising public realm works.

1.37 The Retail and Leisure Study 2014 update outlines that the proposed patterns of housing growth across North Tyneside presents an opportunity to expand the provision of Local Centres due to the size of the development proposed within the Draft Local Plan, in particular at Murton and Killingworth.

2 - Review of retail provision at other major development sites

Introduction

2.1 Over the last five years a number of significant developments that have incorporated retail provision as a supporting use have been proposed and considered through the planning process.

2.2 Whilst these smaller retail proposals were not supported by a Local Plan policy and were considered as out-of-centre retail provision the methodology undertaken in providing justification for these, and the evidence of market attractiveness that they provide is a useful comparator in considering provision at the suggested Strategic Allocations. Therefore, this stage section will provide a brief overview of the approach taken in each of these development proposals, and the supporting evidence drawn on to inform the identification of the volume of provision sought and its location within the schemes.

2.3 The following proposals that received permission will be referenced in this section:

- **Cobalt Business Park** (ref: 10/01510/FUL)
  Location: Plot 4, Cobalt Business Park, Silver Fox Way
  Site Size: 1.87 hectares
  Proposal: Development of land for a mix of uses including hotel (C1 Use Class), office (B1 Use Class), retail (A1 Use Class), bank/building society (A2 Use Class) and Cafe (A3 Use Class), associated site access, landscaping and engineering works. (Associated variation of conditions applications).

- **Smith's Dock** (ref:11/02390/OUT)
  Location: Land at Smiths Dock Duke Street North Shields, Tyne and Wear.
  Site Size: 12.8 hectares
  Proposal: Outline planning permission with access to be approved for development comprising of; option A 775 residential units, hotel 4605sqm and 1400 sqm of commercial development A1, A3 and B1. Option B-815 Residential Units and 1400sqm of commercial development A1, A3 and B1.

- **White House Farm** (ref :11/02337/FUL)
  Location: Land at White House Farm Station Road
  Site Size: 32 hectares
  Proposal: Hybrid planning application comprising of; Full planning application for an executive scheme of 366 dwellings incorporating landscaping, wildlife corridors, open space, access, new roundabout and off site highways works and an outline

application for up to 465 square metres of ancillary commercial development (Use Class A1/A2/A3/A4)

- **Station Road** (ref:12/02025/FUL)
  Location: Field north of 45 Sunholm Drive, Wallsend
  Site Size: 28.8 hectares
  Proposal: Hybrid application comprising: Outline planning permission with all matters reserved: Development of 18.976ha for residential uses capable of accommodating approximately 425 dwellings and approximately 400sqm of A1 retail use, 318sqm of D1 health centre use and associated car parking. Full planning permission: Erection of 225 dwellings, construction of a 3 arm roundabout at the roundabout at the A186 (Station Road) and provision of associated open space, landscaping and SUDs and strategic open space. Outline consent was sought for residential use (up to 425 dwellings), approximately 400 square metres of A1 retail use, 318 square metres of D1 Health Centre Use and associated open space and infrastructure.

Policy Justification

2.4 In order to support the large housing schemes outlined above, applicants drew from the NPPF which outlines government policy which centres on ‘the town centre first’ approach for town centre uses. The NPPF states that local planning authorities should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan. They should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered.

2.5 NPPF also states that for larger scale residential developments in particular, planning policies should promote a mix of uses in order to provide opportunities to undertake day-to-day activities including work on site. Where practical, particularly within large-scale developments, key facilities such as local shops should be located within walking distance of most properties.

2.6 In the same way as the draft Local Plan (2015), Policy S3 of the North Tyneside Unitary Development Plan states that the town centre’s of Wallsend, North Shields and Whitley Bay (with the addition of Killingworth) will continue to be maintained and enhanced as the main focus for retail provision and associated facilities.

2.7 All applicants for the proposed developments utilised UDP Policy S10 which states that the provision of small scale convenience shopping provision outside established shopping centres and within residential areas will be supported where all of the following criteria can be met - the proposal would meet an identified local need; the proposal would not affect, either singly or cumulatively, the vitality and viability of any established shopping centres; the proposal would not have an adverse affect on the amenity of adjacent premises or on the surrounding area; the proposal can be adequately serviced; and, parking can be provided in accordance with the Council's parking standards. Draft Policy DM6.11 in the Local Plan outlines similar criteria.

2.8 In all four previous development cases, the applicants justified the nature and scale of the proposed commercial element of the developments through its intended role to support a top-up shopping facility to a very localised catchment, thus supporting NPPF principles which outline the need for more sustainable patterns of development, reducing the need to travel by private car.

Supporting Evidence for the volume and location of commercial provision

Cobalt Business Park

2.9 Applicants considered the proposed development against UDP Policy LE1/2 which states that 'proposals for directly related services and amenities will be acceptable where their size and nature are designed primarily to serve employees of there major sites'. The applicants also referenced an inspectors report into the UDP Inquiry which stated that 'major employment sites can be enhanced by facilities primarily serving those working in an area'. It was identified that the lack of amenity facilities on site at Cobalt Business Park to accommodate the day-to-day needs of the employee's the created an unsustainable travel patterns. Employee's were having to make a number of additional trips via private car to areas such as the Silverlink and Northumberland District Centre for such services.

2.10 A Retail Impact Assessment submitted in line with the application demonstrated that there was both a quantitative and qualitative need for additional convenience goods Floorspace in the Primary Catchment Area. The report also included a Sequential Assessment of alternative sites, concluding that Northumberland District Park would not be affected by trade diversion. The report acknowledged that whilst there were a large number of out of centre convenience goods stores within and outside the Primary Catchment Area they mainly catered for the bulk food shoppers rather than the local convenience market that the proposed retail provision would cater for.

Smiths Dock

2.11 The applicant submitted a Town Centre Uses assessment in support of its application. The research carried out in this instance showed that North Shields town centre contained around 20,000 sq m of Class A1 floorspace; the largest for any town centre in North Tyneside. When the scale and offer of the town centre was compared to the size of the retail proposed (which has a specific and localised top-up shopping role), then it was unlikely that its operations would undermine the current shopping offer present within the town centre. In terms of turnover, the small scale nature of the proposed retail units when compared to the existing retail in North Shields was considered not to have a significant impact on turnover in North Shields. Indeed it was also likely that given the site's proximity to the town centre, that future residents of Smiths Dock themselves will use and support its facilities.

2.12 The Applicant demonstrated that the scale of the residential development at Smiths Dock was likely to bring significant additional spending to North Shields and the local area and have a positive impact on the future vitality and viability of the town centre.

2.13 The applicant for Smith's Dock also submitted a sequential assessment in support of the application. The report detailed that in the previous Retail and Leisure Study (2007) it was identified that within North Shields Town Centre itself the convenience retail facilities were limited; with a Co-op, Iceland and Netto foodstores (now Asda). As one of the larger town centres in the Borough, North Shields' focus is more on the provision of comparison goods floorspace rather than convenience goods with only 14.2% of net floorspace in the town centre being classed as selling convenience goods. The sequential assessment concluded that there are no sequentially available or suitable sites within or on the edge of North Shields town centre for retail uses. The available sites were considered too small. The applicant outlined that the retail units proposed would provide for day to day top up convenience shopping for future residents and therefore needed to be located within the Smith's Dock site. It was argued that this provided further benefits of reducing the need for additional trips being made for convenience shopping, thus adding to the sustainability of the site.

White House Farm

2.14 Similarly to Smiths Dock, the Applicant for White House Farm submitted a Town Centre Use assessment in support of the application.

2.15 The primary consideration for the commercial scheme was whether the proposal can meet the requirements of a Sequential Test in relation to town centres. The nearest town centre was Killingworth Town Centre, located approximately 3km to the east of the application site. In the same instance it was identified that the housing development would likely create a demand for some level of associated retail development which is supported in NPPF as it recognises the need for larger residential developments to incorporate other key uses.

2.16 The Applicant carried out a sequential test of the premises available within the shopping centre at Killingworth and it identified only one property that could accommodate the proposed commercial development. This premise was at first floor level and was last used as a community D2 use. The applicant considered that its first floor location would not be appropriate for the range of uses proposed (A1-A4) and furthermore the existing D2 use contributes towards the vitality of Killingworth town centre and should be retained. Some weight was also given to the argument that customers are unlikely to want to go to the effort of visiting the first floor for the types of uses required.

2.17 In a further assessment, the Applicant found that based upon the 2010 Mintel Retail Rankings and the 2007 Retail Assessment, the turnover of the Killingworth Centre Morrisons was likely to be in the region of £47m per annum (not accounting for any increased turnover as a result of the extended catchment). Based upon average sales densities, the turnover of the proposed development was expected to be in the order of £2.1m. This represented less than 4.5% of the Morrisons turnover and was not expected to result in a 'significant impact' upon the centre.

2.18 In this regard the commercial element to the proposed development was restricted to a total gross floorspace of 465 sqm (5,000 sqft) in order to ensure that it was suitable to service the proposed development and a very limited catchment surrounding the application site, without resulting in any identifiable trade draw from any other existing facilities within the locality, and not result in a significant impact on other centres. Due to the location of the development it was anticipated that a proportion of trade would be derived from traffic already using the A189 and employment facilities in the locality.

2.19 The catchment area used was based largely upon a 3 minute drive time of the application site, taking into account those areas which were separated from the proposed development by physical barriers (i.e. major road intersections) and extended to those areas which are better related to the application site than other facilities beyond the catchment.

2.20 The commercial element of the proposed development is located in a prominent position within the wider application site, with frontage onto the A189. It was positioned the location of the proposed development would reduce the requirement for residents to access more distant facilities by private car and will benefit from the residential population of the application site and some areas beyond. Due to the scale of facilities at the Killingworth Centre, it was not expected that the proposed development will have any impact upon 'main shopping' trips although it will decrease the need for residents to undertake more frequent 'top-up shopping' trips by private car.

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Station Road

2.21 The commercial component of the proposed development at Station Road is subject to a reserved matters planning application and therefore only the principle was considered.

2.22 With this the Applicant justified the need for small scale commercial development through the use of National Planning Policy as detailed in the previous section. The Applicant emphasised that the development would largely act as an extension to the settlement, enhancing existing local facilities identified through their Transport Assessment and Design and Access statement.

Conclusion

2.23 This section has highlighted recent examples of how major employment and housing proposals have provided justification and evidenced the need for local, out of centre retail facilities. In all cases applicants:

- Drew upon specific National and Local Planning policy in order to establish a base argument for the need for small-scale retail services.
- Identified that there were no sequentially preferable site in-centre, edge of centre or existing out-of-centre development sites.
- Outlined the specific needs required, i.e. to serve a small catchment area for day to day needs.
- (Whilst not always required), implemented an Impact Assessment in order to illustrate that the proposal would have no significant adverse impacts, either individually or cumulatively, on exiting centres.
- The need for sustainability and reduced travel to daily local services was utilised in supporting arguments.

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3 – Establishing the broad scale of new retail provision

3.1 This section utilises the growth data from the North Tyneside Retail and Leisure Update 2014 to estimate the volume of retail floorspace potentially supported through growth on site at Murton and Killingworth Moor over the life of the Local Plan to 2032. The methodology on which the scale of potential retail provision has been determined is informed by the Borough wide study. Key steps in making a site specific assessment include:

a) Calculating the estimated population on site for 2029, 2024 and 2032 (informed by the Murton and Killingworth Moor Population Estimates Note).

b) Establishing a site specific per capita expenditure for years 2019, 2024 and 2032.

c) To establish the robustness of the calculation – recreating the Retail and Leisure Study borough wide retail expenditure and floorspace calculation.

d) Undertake site specific assessment that takes into consideration, the scale of growth on site, the role any new provision could play in meeting needs for adjacent communities, the impact of committed and potential retail growth and the potential benefits for town centres.

3.2 The table below provides an explanatory note to each point of the calculation undertaken in identifying potential retail provision at Murton and Killingworth Moor.

Table 1: Calculating retail capacity – Explanatory Note

	Entry / Assumption	Explanatory note
	Identifying relevant population	
A	Population on site	the number of residents forecast on site, in phases to 2019, 2024 and 2032.
B	Population from existing homes*	the population identified from existing adjacent communities that analysis indicates are relatively remote from an existing small centre or parade.
C	Total population potentially served	the existing and forecast population combined.
	On Site potential spend and floorspace	
D	Total retail spend£	the amount of spend from the residents forecast on the strategic allocation, based on a forecast spend per capita.
E	Retained spend£	the expenditure from the site expected to be retained within North Tyneside.
F	Retained spend phased	illustrates the growth in retained spend between each phase.
G	Initial floorspace generated (Net Sqm)	calculates the amount of floorspace the forecast population of the site would support, but is not the final proposed scale of any new retail floorspace to be provided on site.
	Existing homes spend and floorspace	
H	Total retail£	the amount of spend from residents of the existing community adjacent to the site.
I	75% of existing population£ applied	applies a reduction in spend from those existing residents to

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	Entry / Assumption	Explanatory note
		reflect existing preferences and uncertainty regarding diversion of this spend to new provision.
J	Total retail retained£	the expenditure from the site expected to be retained within North Tyneside.
K	Total retail retained phased£	illustrates the growth in retained spend between each phase. For the existing community this is based solely on increase in expenditure per capita.
L	Initial floorspace generated (Net Sqm)	calculates the amount of floorspace the forecast population of the site would support, but is not the final proposed scale of any new retail floorspace to be provided on site.
	On Site and existing homes spend and floorspace	
M	Total retail£	The above rows combined to incorporate new population growth from the proposed scheme and the existing community.
N	Total retail retained£	
O	Total retail retained and phased£	
P	Initial floorspace generated (Net sqm)	
	Estimating impact of special trading and over-trading	
Q	Murton (site) Growth as % of Total Growth	Considers the proportion of total forecast borough wide convenience spending growth that would arise through the forecast population at the identified strategic allocation.
R	Murton (site) Spend as % of Total Spend	Considers the proportion of convenience spending in total for the borough that would arise from the identified strategic allocation.
S	Committed new build retail growth	Considers the potential expenditure that could be diverted to committed retail permissions not yet built.
T	Existing turnover – based on total spend	Considers the potential expenditure that could be diverted to increasing turnover from the existing retail floorspace already built. Based on the proportion identified at Row R.
U	Special trading – based on total spend	Considers the potential expenditure that could be diverted to other forms of trading such as online. Based on the proportion identified at Row R.
V	Overtrading – based on total spend	Considers the expenditure any retail floorspace currently overtrading and therefore potentially added to recognised needs. Based on the proportion identified at Row R.
W	Overtrading floorspace (Net sqm)	The floorspace arising from overtrading expenditure.
	Residual Spend and Floorspace Requirement	
X	Residual Spend Phased (Inc. Overtrading)	The effective expenditure remaining on site following consideration of Rows Q to W. Note this does not take account of additional growth at neighbouring town and district centres.
Y	Initial floorspace generated (Net sqm)	Calculates the net floorspace arising from the residual expenditure at a sales density by 2032 of £10,425/sqm for convenience and £7,348 for comparison.
Z	Initial floorspace generated (Gross sqm)	The estimated gross area to accommodate the net floorspace.
	Assessing Impact of Growth at Northumberland Park	
AA	Proposed LP growth	Growth anticipated at Northumberland Park, a key district centre adjacent to the strategic sites, proposed within the Local Plan Consultation Draft 2015.
AB	Proposed LP growth phased	Growth at Northumberland Park in each phase 2019, 2024 and 2032.

	Entry / Assumption	Explanatory note
AC	Spend based on floorspace quoted	The estimated total expenditure that could be accommodated by the identified new floorspace.
AD	Spend at Murton diverted to N'Land Park	The expenditure arising from the strategic allocation diverted to new floorspace at Northumberland Park. Based on the proportion of growth set out at Row Q.
AE	Spend at Murton less spend at N'land Park	The remaining spend on site following an allowance for growth at Northumberland Park.
Estimated Scale of Retail Provision at Potential New Centre		
AF	Floorspace (Net sqm)	The net residual floorspace on site taking additionally taking into account growth at Northumberland Park, at a sales density by 2032 of £10,425/sqm for convenience and £7,348 for comparison.
AG	Floorspace (Gross sqm)	The gross residual floorspace on site taking additionally taking into account growth at Northumberland Park.
	Estimated contributions to town centre regeneration	
AH	Current vacancy – Town Centre A1 Units (sqm)	The latest estimate of vacant floorspace at relevant town centres.
AI	Proportion Convenience	The estimated amount of vacant floorspace likely to be reoccupied for convenience use.
AJ	Spend Capacity of Vacant Floorspace @£ for Murton 2032 (site)	The expenditure capacity of vacant floorspace at 2032 sales density data.
AK	Spend arising at Murton potentially diverted to Whitley Bay (town centre) vacancy (75%)	The proposed contribution / expenditure diverted from the strategic site to town centres.
AL	Residual Spend at Murton incorporating N'land Park and TC vacancy	The effective expenditure remaining on site following additional consideration of Rows AH to AK.
	Final estimated scale of Retail Provision at potential new centre	
AM	Floorspace 2032 less town centre allowance (Net sqm)	The net residual floorspace on site taking additionally taking into account growth at expenditure diverted to existing town centres, at a sales density by 2032 of £10,425/sqm for convenience and £7,348 for comparison.
AN	Floorspace 2032 less town centre allowance (Gross sqm)	The gross residual floorspace on site taking additionally taking into account spending at town centres.

Borough wide retail expenditure and floorspace calculation

3.3 In order to benchmark the site specific calculations and verify that the approach undertaken and assumptions made fully accorded with the North Tyneside Retail and Leisure Study 2014 the Borough wide retail assessment was initially replicated. In doing so this verified that key inputs such as Sales Density per Square Metre and retention rates were accurate.

Table 2: Convenience Floorspace North Tyneside Preferred Growth Scenario

	2019	2024	2032	2014 - 2032
Sales Density £/sqm	£10,067	£10,178	£10,425	£10,425
Total Retail Spend Borough Wide	£398,700,000	£424,600,000	£469,490,000	£88,490,000

	2019	2024	2032	2014 - 2032
Retention Rate	92.5%	92.5%	92.5%	92.5%
Retained Spend Borough Wide	£368,775,412	£392,780,943	£434,395,622	£97,210,623
Retained Spend Borough Wide Phased	£31,590,412	£24,005,531	£41,614,679	
Total Committed New Build	£36,400,000	£36,800,000	£37,700,000	£37,700,000
Total Committed New Build Phased	£36,400,000	£400,000	£900,000	
Existing Built Turnover£	£337,185,000	£340,900,000	£349,200,000	£12,015,000
Existing Built Turnover Phased	£-	£3,715,000	£8,300,000	
Special trading total	£800,000	£1,600,000	£2,700,000	£2,700,000
Special trading phased	£800,000	£800,000	£1,100,000	
Current Shortfall / Surplus	-£5,609,588	£13,480,943	£44,795,623	£44,795,623
Overtrading	£20,700,000			£-
Overtrading floorspace (sqm)	2,056.22			£2,056
Residual Spend (Inc. Overtrading)	£15,090,412	£19,090,531	£31,314,679	£44,795,622
Floorspace – Net (phased) sqm	**1,499**	**1,876**	**3,004**	**6,378**
Floorspace - Gross	2,306	2,886	4,621	9,813
Net to Gross Ratio	1.54	1.54	1.54	1.54

Table 3: Comparison Floorspace North Tyneside Preferred Growth Scenario

	2019	2024	2032	2014 - 2032
Sales Density£/sqm	£5,495	£6,175	£7,348	£7,348
Total Retail Spend Borough Wide	£789,000,000	£950,800,000	£1,290,500,000	£633,900,000
Retention Rate	58%	58%	58 %	58%
Retained Spend Borough Wide	£457,575,192	£551,474,505	£748,458,860	£399,147,660
Retained Spend Borough Wide Phased	£108,263,992	£93,899,312	£196,984,354	
Total Committed New Build	£19,600,000	£22,000,000	£26,200,000	£26,200,000
Total Committed New Build Phased	£19,600,000	£2,400,000	£4,200,000	
Existing Built Turnover£	£406,800,000	£457,200,000	£544,000,000	£194,688,800
Existing Built Turnover Phased	£57,488,800	£50,400,000	£86,800,000	
Special trading total	£25,900,000	£44,300,000	£72,300,000	£72,300,000
Special trading phased	£25,900,000	£18,400,000	£28,000,000	
Current Shortfall / Surplus	£5,275,193	£27,974,505	£105,958,860	£105,958,860
Overtrading	£-			£-
Overtrading floorspace (sqm)	-			-
Residual Spend (Inc. Overtrading)	£5,275,192	£22,699,312	£77,984,354	£105,958,860
Floorspace – Net (phased) sqm	**960.00**	**3,676.00**	**10,613.00**	**15,249.00**
Floorspace - Gross	*1,372.00*	*5,253.63*	*15,167.77*	*21,793.40*
Net to Gross Ratio	*1.43*	*1.43*	*1.43*	*1.43*

Estimating an estimate of maximum retail floorspace provision at both Murton and Killingworth

Per Capita Expenditure

3.4 A key, potentially unique factor distinguishing the calculation of retail capacity between Murton and Killingworth Moor is any broad differences in the per capita spend between the sites. To reflect this, an initial calculation has been undertaken to establish an estimated per capita rate of expenditure for Convenience and Comparison goods.

3.5 Both the Murton and Killingworth Moor suggested Strategic Allocations span a wide area of North Tyneside with communities along the boundaries of the sites exhibiting differing levels of expenditure per capita. Within the Retail and Leisure Update 2014 the following zones set out rates of retail expenditure.

Table 4: North Tyneside Convenience Goods Expenditure per Capita

Zone	1. Killing-worth	2. N'berlanld Park	3. Whitley Bay Monkseaton Whitley Lodge	4. North Shields Tynemouth Preston Grange	5. Silverlink	6. Wall-send	7. Forest Hall Longbenton	GB Avg.
2012	£1,897	£1,811	£2,071	£1,957	£1,696	£1,768	£1,875	£2,100
2014	£1,863	£1,779	£2,034	£1,922	£1,666	£1,736	£1,841	£2,062
2019	£1,910	£1,823	£2,085	£1,971	£1,708	£1,780	£1,888	£2,113
2024	£1,978	£1,888	£2,159	£2,041	£1,768	£1,843	£1,955	£2,189
2032	£2,090	£1,995	£2,280	£2,156	£1,868	£1,947	£2,065	£2,278

Source: North Tyneside Retail and Leisure Update, 2014, PBA

Table 5: North Tyneside Comparison Goods Expenditure per Capita

Zone	1. Killing-worth	2. N'berland Park	3. Whitley Bay Monkseaton Whitley Lodge	4. North Shields Tynemouth Preston Grange	5. Silverlink	6. Wall-send	7. Forest Hall Longbenton	GB Avg.
2012	£2,878	£2,789	£3,533	£3,153	£2,258	£2,541	£2,886	£3,102
2014	£3,175	£3,078	£3,898	£3,480	£2,492	£2,804	£3,185	£3,425
2019	£3,738	£3,623	£4,589	£4,097	£2,934	£3,301	£3,749	£4,031
2024	£4,380	£4,246	£5,377	£4,800	£3,437	£3,868	£4,393	£4,722
2032	£5,681	£5,507	£6,974	£6,226	£4,458	£5,016	£5,698	£6,124

Source: North Tyneside Retail and Leisure Update, 2014, PBA

3.6 As set out within the North Tyneside Retail and Leisure Update, 2014 the 2012-based per capita comparison expenditure data is sourced from Experian MMG3. The 2012-based per capita comparison expenditure data is projected forward using the central case forecasts set out by Experian in Retail Planner Briefing Note 12.1 (Appendix 4a, October 2014).

3.7 To establish an average per capita expenditure arising from Murton and Killingworth Moor; the following proportions set out at Tables 6 through to 9 have been applied to selected zones.

Table 6: Murton Convenience Goods Expenditure per Capita

Zone	2. N'berland Park	3. Whitley Bay Monkseaton Whitley Lodge	4. North Shields Tynemouth Preston Grange	5. Silverlink	Murton Strategic Allocation
2012	£1,811	£2,071	£1,957	£1,696	**£1,944.1**
2014	£1,779	£2,034	£1,922	£1,666	**£1,909.5**
2019	£1,823	£2,085	£1,971	£1,708	**£1,957.3**
2024	£1,888	£2,159	£2,041	£1,768	**£2,026.8**
2032	£1,995	£2,280	£2,156	£1,868	**£2,140.9**
Proportion Applied to Murton	30%	50%	10%	10%	**100%**

Table 7: Murton Comparison Goods Expenditure per Capita

Zone	2. Northumberland Park	3. Whitley Bay Monkseaton Whitley Lodge	4. North Shields Tynemouth Preston Grange	5. Silverlink	Murton Strategic Allocation
2012	£2,789	£3,533	£3,153	£2,258	**£3,144.3**
2014	£3,078	£3,898	£3,480	£2,492	**£3,469.6**
2019	£3,623	£4,589	£4,097	£2,934	**£4,084.5**
2024	£4,246	£5,377	£4,800	£3,437	**£4,786**
2032	£5,507	£6,974	£6,226	£4,458	**£6,207.5**
Proportion Applied to Murton	30%	50%	10%	10%	**100%**

Within the above tables a weighting of 50% is applied to Zone 3: Whitley Bay etc… 30% is applied to Zone 2: Northumberland Park and 10% is applied to Zones 4 and 5, North Shields and Silverlink.

Table 8: Killingworth Moor Convenience Goods Expenditure per Capita

Zone	1. Killingworth	2. Northumberland Park	7. Forest Hall, Longbenton	Killingworth Strategic Allocation
2012	£1,897	£1,811	£1,875	**£1,869**
2014	£1,863	£1,779	£1,841	**£1,835.6**
2019	£1,910	£1,823	£1,888	**£1,881.7**
2024	£1,978	£1,888	£1,955	**£1,948.7**
2032	£2,090	£1,995	£2,065	**£2,059**
Proportion Applied to Killingworth Moor	60%	30%	10%	**100%**

Table 9: Killingworth Moor Comparison Goods Expenditure per Capita

Zone	1. Killingworth	2. Northumberland Park	7. Forest Hall, Longbenton	Killingworth Strategic Allocation
2012	£2,878	£2,789	£2,886	**£2,852.1**
2014	£3,175	£3,078	£3,185	**£3,146.9**
2019	£3,738	£3,623	£3,749	**£3,704.6**
2024	£4,380	£4,246	£4,393	**£4,341.1**

Zone	1. Killingworth	2. Northumberland Park	7. Forest Hall, Longbenton	Killingworth Strategic Allocation
2032	£5,681	£5,507	£5,698	**£5,630.5**
Proportion Applied to Killingworth Moor	60%	30%	10%	**100%**

3.8 Within the tables above for apportioning retail expenditure at Killingworth Moor, a weighting of 60% has been applied to Zone 1: Killingworth, 30% to Zone 2: Northumberland Park and 10% to Zone 7: Forest Hall.

Site specific retail expenditure and floorspace calculation

3.9 The projected spend per capita for the Murton and Killingworth Moor Sites were established at Table 6 to 9.

3.10 Additional studies prepared by Capita North Tyneside have estimated population growth arising at Murton and Killingworth as a result of the proposed development. These forecast growth by 2032 of 7,064 residents at Murton and 4,795 residents at Killingworth Moor.

3.11 The population estimate for the existing homes adjacent to the Murton site is based on identification of 1,722 homes at a dwelling occupancy of 2.08, a population of 3,581. For comparison the area identified is roughly equivalent to Lower Super Output Areas 009A, 015A and 015C. At 20011 these LSOAs had a combined population of 4,605. The estimate of existing population present utilising services provided by a new centre at Murton is relatively conservative but provides a sound estimate of the population potentially served by new provision if it sufficiently accessible.

3.12 The communities adjacent to Killingworth Moor that are also relatively remote from existing centres are estimated at roughly 650 homes. This would equate to a population of 1,352 residents at 2.08. However, analysis of the Output Area (E00166144, E0043148, E0043135 and E0043140) population of these communities suggests a population at 2011 of 1,372. To again take the more conservative approach the population from existing communities applied to the calculation above has been reduced to 1,000.

Calculating potential provision at Murton

Table 10: Estimating Convenience Floorspace Provision at Murton

		2019	2024	2032	2014 - 2032
	Identifying relevant population				
A	Population on site	306	1,686	7,064	
B	Population from existing homes*	3,581	3,581	3,581	

		2019	2024	2032	2014 - 2032
C	Total population potentially served	3,887	5,267	10,645	
	On Site potential spend and floorspace				
D	Total retail spend£	£598,934	£3,417,185	£15,123,318	
E	Retained spend£	£553,981	£3,161,105	£13,992,850	
F	Retained spend phased	£553,981	£2,607,124	£10,831,745	£13,992,850
G	Initial floorspace generated (Net Sqm)	55	256	1039	1,350
	Existing homes spend and floorspace				
H	Total retail£	£7,009,091	£7,257,971	£7,666,563	£7,666,563
I	75% of existing population£ applied	£5,256,818	£5,443,478	£5,749,922	
J	Total retail retained£	£4,862,266	£5,035,550	£5,320,115	£5,320,115
K	Total retail retained phased£	£4,862,266	£173,284	£284,566	
L	Initial floorspace generated (Net Sqm)	483	17	27	527
	On Site and existing homes spend and floorspace				
M	Total retail£	£5,855,752	£8,860,663	£20,873,240	
N	Total retail retained£	£5,416,246	£8,196,655	£19,312,965	
O	Total retail retained and phased£	£5,416,246	£2,780,408	£11,116,311	£19,312,965
P	Initial floorspace generated (Net sqm)	538	273	1,066	1,878
	Estimating impact of special trading and over-trading				
Q	Murton Growth as % of Total Growth	17%	12%	27%	
R	Murton Spend as % of Total Spend	1.5%	2.1%	4.4%	
S	Committed new build retail growth	£-	£-	£-	£-
T	Existing turnover – based on total spend	£-	£77,526	£369,013	£446,539
U	Special trading – based on total spend	£11,750	£16,695	£48,905	£77,350
V	Overtrading – based on total spend	£304,023.26			£304,023
W	Overtrading floorspace (Net sqm)	30			
	Residual Spend and Floorspace Requirement				
X	Residual Spend Phased (Inc. Overtrading)	£5,708,520	£2,686,188	£10,698,392	£19,093,100
Y	Initial floorspace generated (Net sqm)	567	264	1,026	1,857
Z	Initial floorspace generated (Gross sqm)	872	406	1,579	2,857
	Assessing Impact of Growth at Northumberland Park				
AA	Proposed LP growth	1,000	2,000	2,500	
AB	Proposed LP growth phased	1,000	1,000	500	2,500
AC	Spend based on floorspace quoted	£10,067,000	£10,178,000	£5,212,500	£25,457,500
AD	Spend at Murton diverted to N'Land Park	£1,726,010	£1,178,853	£1,392,388	£4,297,250
AE	Spend at Murton less spend at N'land Park	£3,982,510	£1,507,335	£9,306,005	£14,795,850
	Estimated Scale of Convenience Provision at Potential New Centre				
AF	Floorspace (Net sqm)	396	148	893	1,436
AG	Floorspace (Gross sqm)	609	228	1,373	2,210
	Estimated contributions to town centre regeneration				
AH	Current vacancy - Whitley Bay A1 Units (sqm)	2,673			
AI	Proportion Convenience	668			
AJ	Spend Capacity of Vacant Floorspace @£ for Murton 2032			£6,967,248	
AK	Spend arising at Murton potentially diverted to Whitley Bay vacancy (75%)			£5,225,436	

		2019	2024	2032	2014 - 2032
AH	Current vacancy - North Shields A1 Units	4,200			
AI	Estimate of future convenience use of vacant floorspace (50%)	1,050			
AJ	Spend Capacity of Vacant Floorspace @£ for Murton 2032			£10,946,389	
AK	Spend arising at Murton potentially diverted to North Shields vacancy (25%)			£2,736,597	
AF	Residual Spend at Murton incorporating N'land Park and TC vacancy			£6,833,815	
AM	**Final estimated scale of Retail Provision at potential new centre**				
AI	Floorspace 2032 less town centre allowance (Net sqm)			**656**	**656**
AJ	Floorspace 2032 less town centre allowance (Gross sqm)			**1,008**	**1,088**

Table 11: Estimating Comparison Floorspace at Murton

		2019	2024	2032	2014 - 2032
	Identifying relevant population				
A	Population on site	306	1,686	7,064	
B	Population from existing homes*	3,581	3,581	3,581	
C	Total population potentially served	3,887	5,267	10,645	
	On Site Initial spend and floorspace				
D	Total retail spend£	£598,934	£3,417,185	£15,123,318	
E	Retained spend£	£553,981	£3,161,105	£13,992,850	
F	Retained spend phased	£975,157	£5,063,367	£24,065,861	£30,104,385
G	Initial floorspace generated (Net Sqm)	97	497	2,308	2,903
	Existing homes spend and floorspace				
H	Total retail£	£14,280,670	£16,733,655	£21,703,725	£21,703,725
I	75% of existing population£ applied	£10,710,502	£12,550,241	£16,277,794	
J	Total retail retained£	£9,906,621	£11,609,740	£15,061,029	£15,061,029
K	Total retail retained phased£	£9,906,621	£1,703,119	£3,451,289	
L	Initial floorspace generated (Net Sqm)	984	167	331	1,482
	On Site and existing homes spend and floorspace				
M	Total retail (All)£	£11,309,436	£15,967,426	£31,401,111	
N	Total retail retained£	£6,558,831	£9,261,283	£18,211,887	
O	Total retail retained and phased£	£6,558,831	£2,702,453	£8,950,603	£18,211,887
P	Initial floorspace generated (Net sqm)	1,081	665	2,640	4,385
	Estimating impact of special trading and over-trading				
Q	Murton growth as % of total growth	33%	12%	34%	
R	Murton spend as % of total spend	1.8%	2.4%	4.2%	
S	Committed new build retail growth	£-	£-	£-	£-
T	Existing turnover – based on total spend	£460,642.7	£1,044,539	£3,031,153	£4,536,334
U	Special trading – based on total spend	£93,822	£659,604	£4,442,289	£5,195,714
V	Overtrading – based on total spend	£-			£-
W	Overtrading floorspace (Net sqm)	-			

		2019	2024	2032	2014 - 2032
	Residual Spend and Floorspace Requirement				
X	Residual spend phased (Inc. Overtrading)	£6,004,366	£998,310	£1,477,162	£8,479,839
Y	Initial floorspace generated (Net sqm)	1,093	162	201	1,455
Z	Initial floorspace generated (Gross sqm)	1,562	231	287	2,079
	Assessing Impact of Growth at Northumberland Park				
AA	Proposed LP growth	3,333	6,666	10,000	
AB	Proposed LP growth phased	3,333	3,333	3,334	10,000
AC	Spend based on floorspace quoted	£18,314,835	£20,581,275	£24,498,232	£63,394,342
AD	Spend at Murton absorbed by N'Land Park	£6,128,771	£2,528,178	£8,369,235	£17,026,184
AE	Spend at Murton Less Spend at N'land Park	-£124,404	-£1,529,868	-£6,892,073	-£8,546,345
	Estimated Scale of Convenience Provision at Potential New Centre				
AF	Floorspace (Net sqm)	- 12	-150	**- 661**	**-824**
AG	Floorspace (Gross sqm)	- 18	-215	**- 944**	**- 1,177**

Murton - conclusions

3.13 The above tables support the provision of additional convenience retail floorspace at Murton to be considered as an integral component in the delivery of the site through the master planning process. This provision has the potential, along with the delivery of a range of services to also enhance accessibility of residents at New York and Billy Mill. For comparison shopping, once provision of new comparison floorspace at Northumberland Park and leakage of retail spend out of North Tyneside is taken into account this assessment finds no evidence of need for such provision at a centre at Murton. However, appropriately justified small scale provision if identified as necessary to support the overall viability and sustainability of any centre could be considered.

3.14 Overall, the recommended range for provision of a new centre delivering additional convenience floorspace is between 500 and 1,000 net square metres. Whilst this floorspace may be delivered in a number of separate retail units this scale of convenience provision would exceed the Council's proposed impact threshold of 1000 sqm net. This is provided as a range to illustrate broadly a level of provision that North Tyneside Council may choose to consider as acceptable in the context of new residential development at this location, and the future development of a masterplan for the site.

Calculating Potential Provision at Killingworth Moor

Table 12: Estimating Convenience Floorspace Provision at Killingworth Moor

		2019	2024	2032	2014 - 2032
	Identifying relevant population				
A	Population on site	506	1956	4795	
B	Population from existing homes*	1,000	1,000	1,000	

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		2019	2024	2032	2014 - 2032
C	Total population potentially served	1,506	2,956	5,795	
	On Site Initial spend and floorspace				
D	Total retail spend£	£952,140	£3,811,657	£9,872,905	
E	Retained spend£	£880,677	£3,526,016	£9,134,905	
F	Retained spend phased	£880,677	£2,645,339	£5,608,890	£9,134,905
G	Initial floorspace generated (Net Sqm)	87	260	538	885
	Existing homes spend and floorspace				
H	Total retail£	£1,881,700	£1,948,700	£2,059,000	£2,059,000
I	75% of existing population £ applied	£1,411,275	£1,461,525	£1,544,250	
J	Total retail retained£	£1,305,351	£1,352,000	£1,428,817	£1,428,817
K	Total retail retained phased£	£1,305,351	£46,649	£76,817	
L	Initial floorspace generated (Net Sqm)	130	5	7	142
	On Site and existing homes spend and floorspace				
M	Total retail£	£2,363,415	£5,273,182	£11,417,155	
N	Total retail retained£	£2,186,028	£4,878,016	£10,563,723	
O	Total retail retained and phased£	£2,186,028	£2,691,988	£5,685,707	£10,563,723
P	Initial floorspace generated (Net sqm)	217	264	545	1,027
	Estimating impact of special trading and over-trading				
Q	Killingworth as % of total borough growth	6.9%	11%	14%	
R	Killingworth as % of total borough spend	0.6%	1.2%	2.4%	
S	Committed new build retail growth	£-	£-	£-	£-
T	Existing turnover – based on total spend	£-	£46,137	£201,841	£247,978
U	Special trading – based on total spend	£4,742	£9,935	£26,750	£41,428
V	Overtrading – based on total spend	£122,705.53			£122,706
W	Overtrading Floorspace (Net sqm)	12			
	Residual Spend and Floorspace Requirement				
X	Residual spend phased (Inc. Overtrading)	£2,303,991	£2,635,915	£5,457,116	£10,397,022
Y	Initial floorspace generated (Net sqm)	229	259	523	1,011
Z	Initial floorspace generated (Gross sqm)	352	398	805	1,556
	Assessing Impact of Growth at Northumberland Park				
AA	Proposed LP growth	1,000	2,000	2,500	
AB	Proposed LP growth phased	1,000	1,000	500	2,500
AC	Spend based on floorspace quoted	£10,067,000	£10,178,000	£5,212,500	£25,457,500
AD	Spend from Killingworth Moor growth (Row Q x1.5) Applied to N'Land Park	10%	17%	20%	
AE	Spend at Killingworth Moor diverted to N'Land Park	£1,044,941	£1,712,046	£1,068,256	£3,825,243
AF	Spend at Killingworth Moor less spend at N'land Park	£1,259,050	£923,868	£4,388,860	£6,571,77
	Estimated Scale of Convenience Provision at Potential New Centre				
AG	Floorspace (Net sqm)	125	91	421	637
AH	Floorspace (Gross sqm)	192	140	648	980
	Estimated contributions to town centre regeneration				
AH	Current Vacancy - Killingworth A1	0		-	
AI	Estimate of future convenience use of vacant floorspace (25%)	0		-	

		2019	2024	2032	2014 - 2032
AJ	Convenience spend Capacity of vacant floorspace by 2032	0		-	
AK	Spend arising at Killingworth Moor potentially diverted to Killingworth vacancy	0		-	
AH	Current Vacancy - Wallsend A1	3,002			
AI	Estimate of future convenience use of vacant floorspace (30%)	901			
AJ	Convenience spend Capacity of vacant floorspace by 2032			£9,389,841	
AK	Spend arising at Killingworth Moor potentially diverted to Wallsend vacancy (15%)			£1,408,476	
AF	Residual Spend at Killingworth Moor incorporating N'land Park and TC vacancy			£3,417,437	
AM	**Final estimated scale of Retail Provision at potential new centre**				
AI	Floorspace 2032 less town centre allowance (Net sqm)			**328**	**328**
AJ	Floorspace 2032 less town centre allowance (Gross sqm)			**504**	**504**

Table 13: Estimating Comparison Floorspace at Killingworth Moor

		2019	2024	2032	2014 - 2032
	Identifying relevant population				
A	Population on site	506	1956	4795	
B	Population from existing homes*	1,000	1,000	1,000	
C	Total population potentially served	1,506	2,956	5,795	
	On Site Initial spend and floorspace				
D	Total retail spend£	£990,394	£3,964,421	£10,265,616	
E	Retained spend£	£916,059	£3,667,331	£9,498,261	
F	Retained spend phased	£1,612,515	£5,393,033	£13,429,125	£20,434,673
G	Initial floorspace generated (Net Sqm)	160	530	1288	1,978
	Existing homes spend and floorspace				
H	Total retail£	£3,704,600	£4,341,100	£5,630,500	£5,630,500
I	75% of existing population£ applied	£2,778,450	£3,255,825	£4,222,875	
J	Total retail retained£	£2,569,912	£3,011,837	£3,907,215	£3,907,215
K	Total retail retained phased£	£2,569,912	£441,925	£895,378	
L	Initial floorspace generated (Net Sqm)	255	43	86	385
	On Site and existing homes spend and floorspace				
M	Total retail£	£3,768,844	£7,220,246	£14,488,491	
N	Total retail retained£	£2,185,715	£4,187,822	£8,402,975	
O	Total retail retained and phased£	£2,185,715	£2,002,107	£4,215,153	£8,402,975

		2019	2024	2032	2014 - 2032
P	Initial floorspace generated (Net sqm)	415	573	1,374	2,363
	Estimating impact of special trading and over-trading				
Q	KM growth as % of total growth	11%	9%	16%	
R	KM spend as % of total spend	0.6%	1.1%	1.9%	
S	Committed new build retail growth	£-	£-	£-	£-
T	Existing turnover – based on total spend	£153,508.1	£472,326	£1,398,576	£2,024,409
U	Special trading – based on total spend	£31,266	£298,264	£2,049,675	£2,379,204
V	Overtrading – based on total spend	£-			£-
W	Overtrading floorspace (Net sqm)	-			
	Residual Spend and Floorspace Requirement				
X	Residual spend phased (Inc. Overtrading)	£2,000,941	£1,231,518	£766,902	£3,999,362
Y	Initial floorspace generated (Net sqm)	364	199	104	668
Z	Initial floorspace generated (Gross sqm)	520	285	149	954
	Assessing Impact of Growth at Northumberland Park				
AA	Proposed LP growth	3,333	6,666	10,000	
AB	Proposed LP growth phased	3,333	3,333	3,334	10,000
AC	Spend based on floorspace quoted	£18,314,835	£20,581,275	£24,498,232	£63,394,342
AD	Spend at KM absorbed by N'Land Park	£2,042,399	£1,872,996	£3,941,366	£7,856,761
AE	Spend at KM Less Spend at N'land Park	-£41,457	-£641,478	-£3,174,463	-£3,857,399
	Estimated Scale of Convenience Provision at Potential New Centre				
AF	Floorspace (Net sqm)	-4	-63	**-305**	**-372**
AG	Floorspace (Gross sqm)	-6	-90	**-435**	**-531**

Killingworth Moor – Conclusions

3.15 The above tables support the provision of additional convenience retail floorspace at Killingworth Moor to be considered as an integral component in the delivery of the site through the master planning process. This provision has the potential to provide some minor benefit for residents of existing communities. However, the relative scale and proximity of Killingworth town centre in the west and Northumberland Park in the east – mean this is not significant. For comparison shopping, once provision of new comparison floorspace at Northumberland Park and leakage of retail spend out of North Tyneside is taken into account this assessment finds no evidence of need for such provision at a centre at Killingworth Moor. However, as with Murton appropriately justified small scale provision if identified as necessary to support the overall viability and sustainability of any centre could be considered.

3.16 Overall, the recommended range for provision of a new centre delivering additional convenience floorspace is between 300 and 500 net square metres. This scale of convenience provision, when considered in total, would not exceed the Council's proposed impact threshold of 500sqm. This is provided as a range to illustrate broadly a level of provision that North Tyneside Council may choose to consider as acceptable in the context of new residential development at this location, and the future development of a masterplan for the site.

4. Analysis of Retail Hierarchy

The broad zones of influence/ catchment of each existing town centre, District Centre, Local Centre and other retail clusters.

Introduction

4.1 There are numerous existing retail centres and clusters of shops across North Tyneside that may prove suitable provision for at least a proportion of the retail needs arising from the new developments. The viability and vitality of those existing centres could also be supported and enhanced by the proposed schemes. Consequently any new centres within the proposed development schemes should take into consideration their relationship to existing retail provision, whilst being of a form and scale that can contribute to the sustainability of any proposed schemes and support the creation of a sense of place.

4.2 North Tyneside's retail hierarchy sets out a list of centres according to size and health. The conclusions of the Retail Capacity Study (2014) and proposed retail hierarchy set out in the North Tyneside Local Plan Consultation Draft 2015 identifies four town centres, five district centres and 4 local centres serving the Borough which are shown in figure 1.

4.3 There are also numerous other small parades of shops and other minor retail clusters across the urban area of the borough that provide a key function in supporting the daily needs of residents.

4.4 This task will utilise existing mapping of every retail centre and other cluster of shops in North Tyneside and provide an assessment of the typical number of homes and distance to a retail centre for each point in the retail hierarchy i.e. to each Town Centre, District Centre, Local Centre and other clusters of shops.

4.5 This task will also consider and interrogate shopping surveys undertaken to inform the borough wide Retail and Leisure Study (2014). This will provide an understanding of the choices made by residents when utilising existing centres to provide an overarching assessment of the catchment for each centre.

Catchment Area for North Tyneside's Area's of Retail

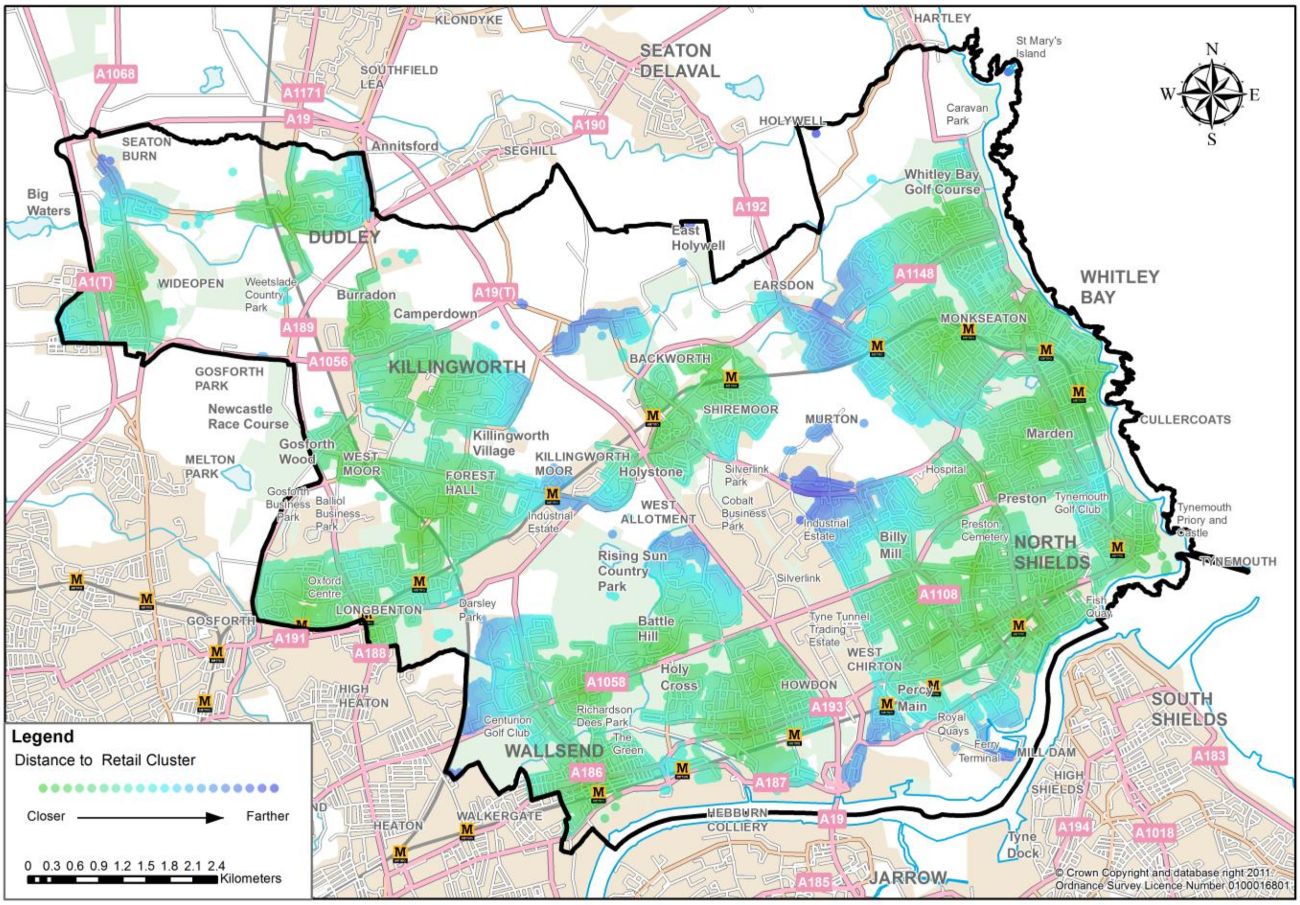

Figure 1- Catchment area for North Tyneside's Area's of Retail

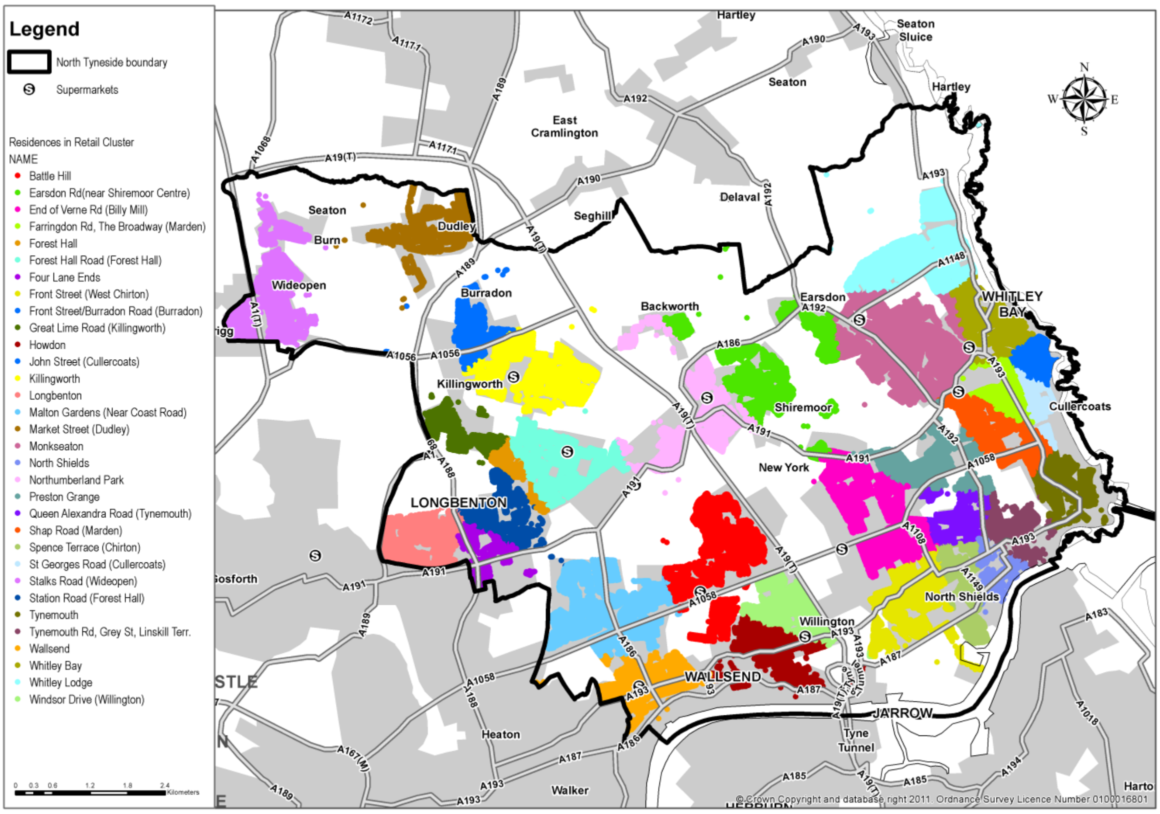

Figure 2-Catchment area for North Tyneside's Areas of Retail

4.6 The map above depicts the various shopping centres, parades and clusters within North Tyneside and the typical catchment area in which it serves. Areas highlighted blue on the map reveal the existing areas within the Borough which are located further away from any retail services. There are some key blue areas around the periphery of both Killingworth Moor and Murton Gap which could benefit from the inclusion of increased retail provision within the area. Obstacles to accessibility have been considered during this process.

4.7 Table 1 below provides further information on the average amount of residences the various retail centres and parades serve. On average, North Tyneside's retail centres serve around 3,000 residences. This average was derived by identifying the closest retail centre to the residential units within North Tyneside.

Table 14: Retail Centre catchment – for local provision

Centre Type	Name	No of Residences
District	Battle Hill	5,016
Parade	Earsdon Road(near Shiremoor Centre)	4,316
Parade	End of Verne Road (Billy Mill)	5101

Parade	Farringdon Road, The Broadway (Marden)	1078
District	Forest Hall	722
Parade	Forest Hall Road (Forest Hall)	3442
Parade	Four Lane Ends	1094
Parade	Front Street (West Chirton)	4419
Parade	Front Street/Burradon Road (Burradon)	1715
Parade	Great Lime Road (West Moor)	1327
Local	Howdon	4045
Parade	John Street (Cullercoats)	1674
Town	Killingworth	3847
District	Longbenton	3231
Parade	Malton Gardens (Near Coast Road)	5143
Parade	Market Street (Dudley)	2562
District	Monkseaton	6906
Town	North Shields	1944
Local	Northumberland Park	3057
Local	Preston Grange	2572
Parade	Queen Alexandra Road (Tynemouth)	1880
Parade	Shap Road (Marden)	2188
Parade	Spence Terrace (Chirton)	2712
Parade	St Georges Road (Cullercoats)	1053
Parade	Stalks Road (Wideopen)	3609
Parade	Station Road (Forest Hall)	1729
District	Tynemouth	2625
Parade	Tynemouth Road, Grey Street,Linskill Terrace (North Shields)	2697
Town	Wallsend	4751
Town	Whitley Bay	3329
Local	Whitley Lodge	3484
Parade	Windsor Drive (Willington)	2950

North Tyneside's Shopping Patterns

4.8 A household survey for the North Tyneside Retail and Leisure Study (2011) was undertaken in order to further inform on shopping patterns within the Borough.

Comparison shopping patterns

4.9 The results of the household survey undertaken for the NTRLS indicated that the Overall Catchment Area achieves a comparison goods 'retention rate' of 53.2 per cent. The most popular destinations for comparison goods shopping trips are shown in the table below. As highlighted within the table, comparison retailing acts as a go to 'destination'.

Table 15: North Tyneside's Comparison Goods Shopping Pattern

Destinations for Comparison Goods spend	Proportion of total expenditure
Silverlink Shopping Park, Coast Road, Wallsend	21.0%
North Shields, Whitley Bay, Wallsend and Killingworth Town centres	16.8%
Other destinations within the OCA	15.3%
Total Retain expenditure	**53.2%**
Newcastle City Centre	28.2%
Other destinations within the buffer zones	3.9%
Other more distant locations	7.2%
SFT	7.5%
Total Leakage	**46.8%**

Convenience shopping patterns

4.10 The results of the household survey indicated that North Tyneside is largely self sufficient in terms of convenience goods shopping. Indeed 88.5 per cent of available expenditure on convenience goods is retained within the Borough.

4.11 The most popular destination for food and grocery shopping within North Tyneside is Asda store in Benton, achieving a market share of 14.6 per cent. The Morrisons store in Preston Grange is the second most popular with a market share of 14 per cent.

4.12 Other main destinations within the Borough include Morrisons in Killingworth (11.1 per cent), Tesco Extra in North Shields (8.9 per cent) and the Sainsbury's and Morrisons stores in Whitley Bay (8.5 per cent and 7.2 per cent respectively).

North Tyneside's Town Centres

4.13 The four town centres in North Tyneside are; North Shields, Wallsend, Whitley Bay and Killingworth. Analysis provided in the Retail Capacity Study 2015 and outcomes of the Household Survey 2011 justify the identification of all four as town centres.

4.14 These four centres contain a large number of convenience retail and service units and they account for the largest comparison goods market shares according to the results of the household survey (2011). Whilst Killingworth Town Centre does not contain some of the uses that might ordinarily be associated with a traditional town centre due to its physical form, it can be considered that Killingworth can be classified as a town centre as it has floor plates that are of a size that attract retailers that are not found in lower order centres.

4.15 The convenience goods retailers that are present in the centres are predominantly local independent stores which do not offer the range of goods that consumers often require.

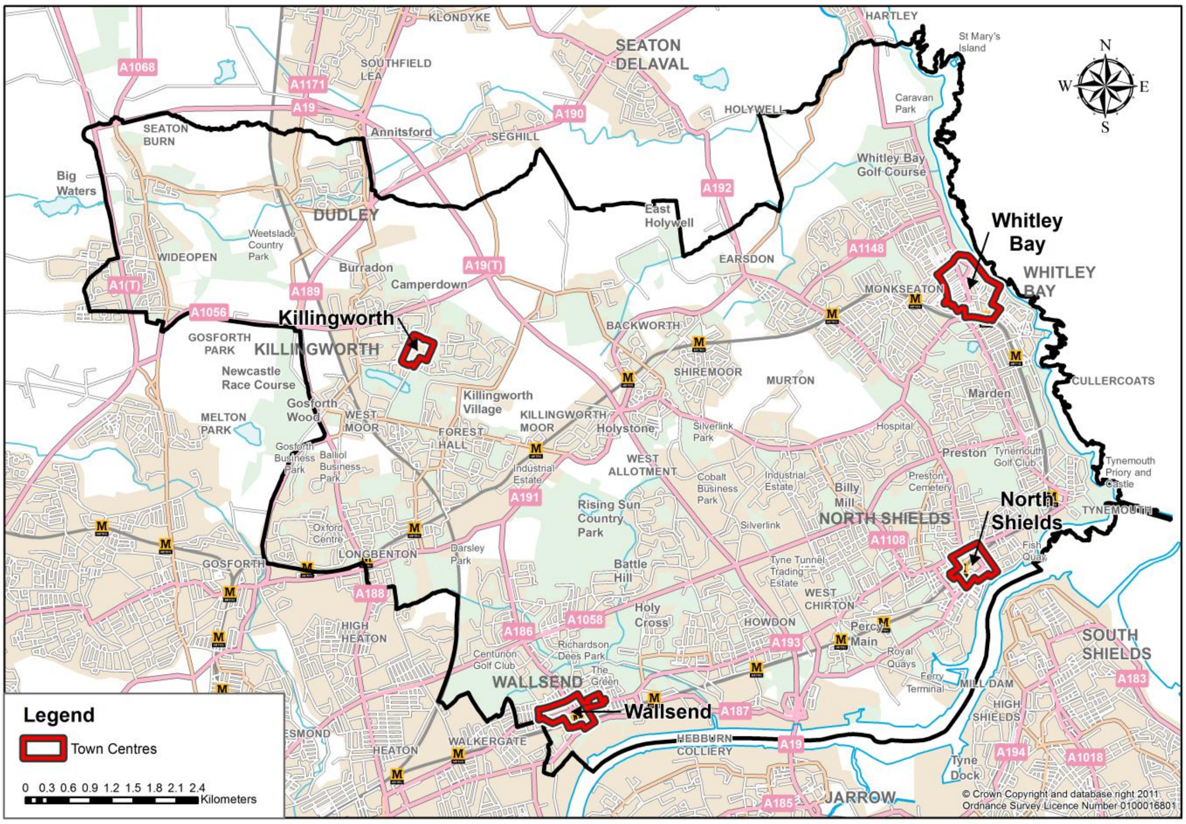

Figure 3- North Tyneside's Town Centres

Local Provision Audit – Identifying District and Local Centres

4.16 North Tyneside's Retail and Leisure Study (2011 and 2014) carried out an audit of its District and Local centres. Table 1 below shows the occurrence of each use in each of the centres. A value is attached to each use which has been weighted according to their value in catering towards local needs. The first ten uses score one point per

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occurrence. A centre will score higher if there is more than one occurrence of each use however; to prevent some centres achieving disproportionately high scores as a result of the proliferation of uses such as cafe's/take-aways and hairdressers, a maximum score of ten was imposed. The next three uses; supermarket, bank and chemist score three points per occurrence. Finally, the two uses within category 3 score five points each.

4.17 A number of additional shopping parades and clusters were identified and tested using the same method as described above. Table 2 reveals a fairly even distribution of facilities throughout North Tyneside relative to the main concentrations of population. These shopping parades and small centres perform an important role in providing people with access to local facilities, however none of the areas are considered significant enough to be classified in the retail hierarchy, except for Howdon. The Retail and Leisure Study (2015) provided justification for the classification of Howdon within the retail hierarchy based on its Local Provision Audit score and the planned retail developments within the former Police Station.

Table 16: North Tyneside's Audit of District and Local Centres

	Battle Hill	Forest Hall	Long-benton	Monk-seaton	N'berland Park	Preston Grange	Tynemouth	Whitley Lodge
				Category 1				
Top-up convenience	1	4	1	1	0	1	1	1
Newsagent	1	1	0	1	0	1	2	0
Off Licence	0	0	2	0	0	0	1	0
Takeaway/ Café / Restaurant	4	9	4	9	3	1	10 (29)	6
Public House		1	0	3	0	0	7	1
Bookmakers	1	2	2	0	1	1	0	1
Opticians	1	1	1	0	0	0	2	0
Hairdresser/ Beauty	1	6	1	10 (11)	1	1	8	2
Other Convenience	1	1	0	10 (20)	1	0	10 (20)	0
Other Town Centre Uses	**4**	**10 (17)**	**10 (23)**	10 (24)	**4**	**3**	10 (35)	**10 (11)**
Total	**14**	**35**	**21**	**44**	**10**	**8**	51	**21**
				Category 2				
Supermarket	2	0	2	0	1	0	1	1

Bank	0	1	0	0	0	0	1	0
Chemist/Pharmacy	1	2	1	1	1	1	1	1
Total	**9**	**9**	**9**	**3**	**6**	**3**	**9**	**6**
Category 3								
Superstore	0	0	0	0	0	1	0	0
Post Office	1	1	1	0	0	1	1	1
Total	**5**	**5**	**5**	**0**	**0**	**10**	**5**	**5**
Total Weighted Score	**28**	**49**	**35**	**47**	**16**	**21**	**65**	**32**

Table 17: Additional Shopping Parades and Clusters

Code	Potential Centre Description	Number of Retail and Service Units	Local Provision Audit Score	Potential Category of Centre
A	Stalks road (Wideopen)	8	14	Shopping Parade
B	Market street (Dudley)	9	15	Shopping Parade
C	Front street/ Burradon road (Burradon)	7	9	Shopping Parade
D	Great Lime road (Killingworth)	6	6	Shopping Parade
E	Station road (Forest Hall)	9	13	Shopping Parade
F	Forrest Hall Road (Forest Hall)	13	13	Shopping Parade
G	Malton Gardens (adjacent Coast Road)	7	9	Shopping Parade
H	Earsdon Road (near Shiremoor centre)	11	11	Shopping Parade
I	Howdon	19	26	Local Centre
J	Windsor drive (Willington)	7	11	Shopping Parade
K	End of Verne road (Billy Mill)	10	12	Shopping Parade
L	Front Street (West Chirton)	9	13	Shopping Parade
M	Spence Terrace (Chirton)	13	13	Shopping Parade
N	Queen Alexandra Road (Tynemouth)	6	6	Shopping Parade
O	Tynemouth Road/ Grey Street, Linskill Terrace (North Shields)	5	5	Shopping Parade
P	Shap Road (Marden)	8	8	Shopping Parade
Q	Farringdon Drive/The Broadway (Marden)	11	13	Shopping Parade
R	St Georges Road (Cullercoats)	12	12	Shopping Parade
S	John Street (Cullercoats)	1	5	Shopping Parade

4.18 The audits reveal a general pattern of use occurrence within the identified retail centres. All of the centres include convenience provision; whether that was through small-scale “top-up” convenience/ newsagents or through the provision of a supermarket. This falls very much in line with the current national trend in which we can see a shift from larger superstores to smaller, more local food stores. The vast majority of the centres identified also included chemist/pharmacy, Post Office, hairdressers, take-aways and restaurants. These types of uses are based around every day needs, uses which people don't often want to travel very far for. A select few of the centres included a comparison retail offer. North Tyneside's comparison retail offer is more specifically located within the main town centres and the Silverlink out of centre retail area.

North Tyneside's District Centres

4.19 District Centres provide smaller scale shopping, allowing people to do "top up" shopping, reducing the need to travel. There are three centres in North Tyneside which can be classified as a District Centre; Forest Hall, Monkseaton and Tynemouth. These three centres have the highest number of retail and service units and achieve the highest three scores in the Local Provision Index.

4.20 Forest Hall and Monkseaton also have the first and second highest market shares of comparison goods spend. Whilst the comparison goods market share for Tynemouth is lower, the centre justifies its classification as a 'District Centre' on the basis of its strong performance in respect of other indicators and also consideration of its important role in the leisure sector. The Retail and Leisure Study highlights a possible change in Northumberland Park's role to become an additional district centre which would help accommodate the need of both current and future residents within the area.

4.21 Table 18 below details the make-up of floorspace within the District Centres. Whilst Northumberland Park has a larger convenience floorspace area with the remaining centres ranging from 772sq. m- 1680 sq. m. Tynemouth and Monkseaton District Centre typically have larger comparison floorspace coverage than convenience. Northumberland Park and Forrest Hall however have a greater convenience floorspace due to the presence of a Sainsbury's Local and Sainsbury's food store. Within the more established centres

Table 18: District Centre Floorspace breakdown

[1]	Location	Total Floorspace (sq. m)	Convenience Floorspace (sq. m)	Comparison Floorspace (sq. m)	Service Floorspace (sq. m)	Other Floorspace (sq. m)
District Centres	Forrest Hall	5156.16	1680.15	851.11	479.67	2145.23
	Monkseaton	6879.45	772.46	1764.3	548.2	3794.49

[1] Please note:
-Comparison includes: Post Offices, Chemist and Pharmacy
-Service includes: Funeral directors, cleaners, hairdressers/barbers, Car repair services
-Other includes: Gyms, snooker, Banks, betting shops, hotels, take-aways, taxis, doctors, offices and vacant units.

	Tynemouth	9274.92	775.98	1145.21	610.24	6743.49
	Northumberland Park	4289.13	3059.26	673.9	222.66	333.31

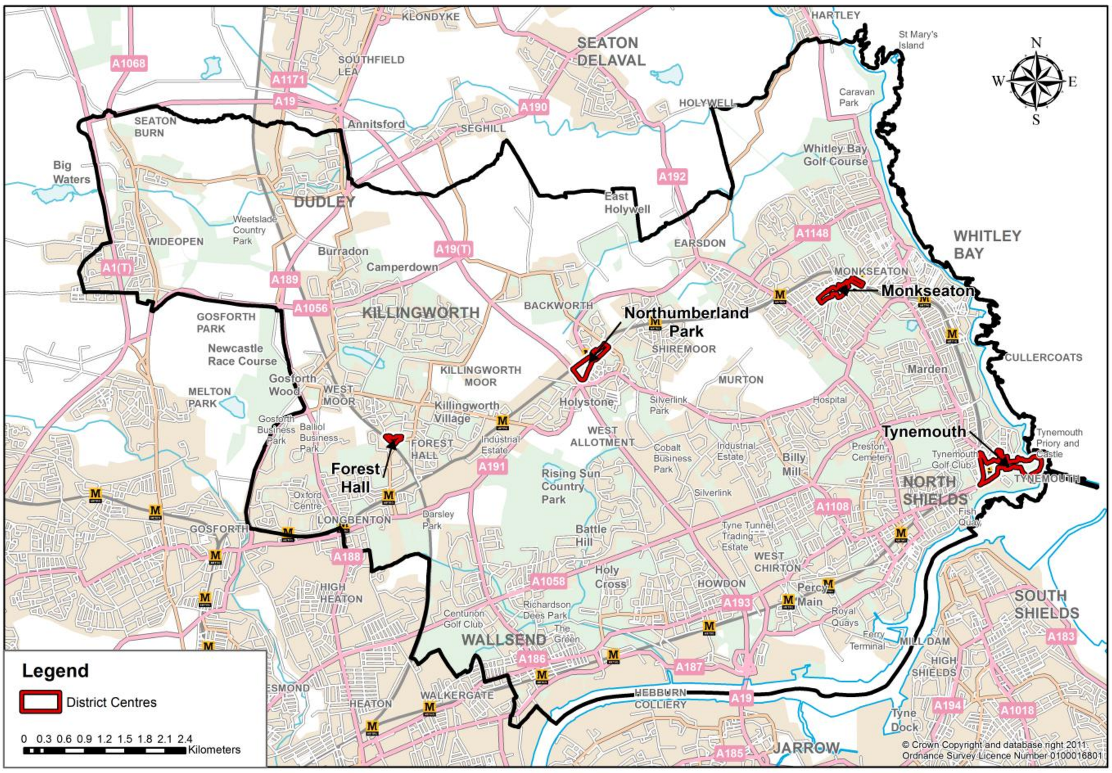

Figure 4- North Tyneside's District Centres

North Tyneside's Local Centres

4.22 North Tyneside's Local Centres are Battle Hill, Longbenton, Northumberland Park (at present), Preston grange and Whitley Lodge. Northumberland Park and Longbenton have excellent access to a Metro station but the remaining three do not and with the total number of units they perform the role of serving local needs rather than a greater catchment.

4.23 Lonbenton has a large number of public service facilities located in its boundary (15 units) that gives the centre a large figure in comparison to the other Local Centres. Furthermore, these centres achieve the lowest five scores in the Local Provision Index, which indicates that their offer of provision supports a local need. The Retail and Leisure Study update (2014) highlighted that Howdon should be classified as a Local centre due to the number of units it contains, the local provision audit score and also the expansion of the former police station site to retail units.

Table 19: Local Centre Floorspace breakdown[2]

	Location	Total Floorspace (sq. m)	Convenience Floorspace (sq. m)	Comparison Floorspace (sq. m)	Service Floorspace (sq. m)	Other Floorspace (sq. m)
Local Centres	Whitley Bay Lodge	3539	579.36	338.23	467.27	2154.16
	Preston	9204.52	8005.8	77.6	313.83	807.29
	Longbenton	4494.34	1141.76	252.47	79.75	3020.36
	Battle Hill	4062.93	2128.4	121.31	147.42	1665.8

[2] Please note:
-Comparison includes: Post Offices, Chemist and Pharmacy
-Service includes: Funeral directors, cleaners, hairdressers/barbers, Car repair services
-Other includes: Gyms, snooker, Banks, betting shops, hotels, take-aways, taxis, doctors, offices and vacant units.

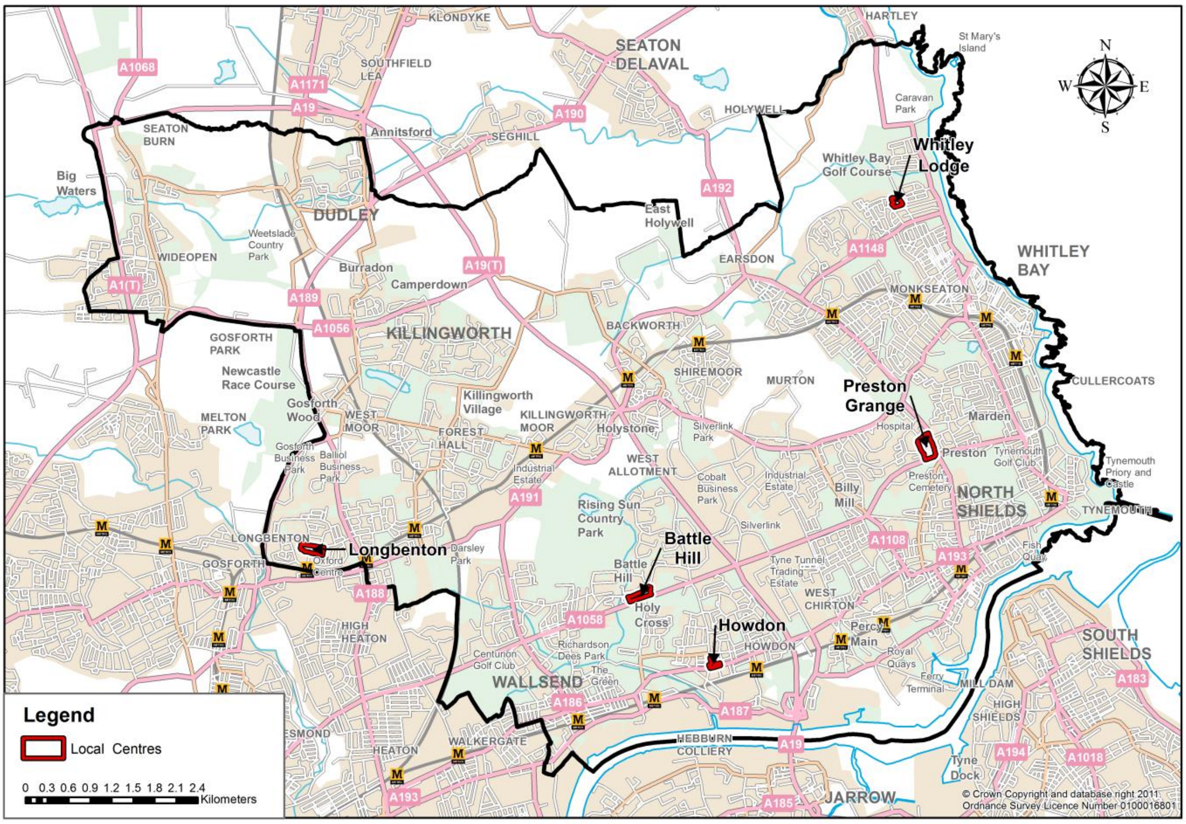

Figure 5- North Tyneside's Local Centres

4.24 The following tables provide some further analysis of the current type and range of provision within the Town and District Centres of North Tyneside.. Overall these illustrate the range of convenience, comparison services, and other provision and the nature and scale of stores typically found in the Borough's centres.

Table 20: Convenience Goods Provision in Town and District Centres

		Town Centres Avg Area/Units	Avg Size	District Centres Avg Area / Units	Avg Size
General Groceries	**Total Area (sqm)**	4,009	293	1,233	411
	Net Sales Area (sqm)	2,127	156	782	261
	#Units	10		3	
Bakery	**Total Area (sqm)**	551	157	96	69
	Net Sales Area (sqm)	224	64	43	31
	#Units	4		1	
Butchers	**Total Area (sqm)**	224	99	22	89
	Net Sales Area (sqm)	81	36	12	48
	#Units	2		0	
Fish-monger	**Total Area (sqm)**	11	21	12	60
	Net Sales Area (sqm)	8	16	6	30
	#Units	1		0	
Green-	**Total Area (sqm)**	176	100	15	54

		Town Centres Avg Area/Units	Avg Size	District Centres Avg Area / Units	Avg Size
grocer	Net Sales Area (sqm)	89	51	11	39
	#Units	2		0	
Off-licence	Total Area (sqm)	66	133	66	131
	Net Sales Area (sqm)	20	40	31	61
	#Units	1		1	
All	Total Area (sqm)	4,034	215	1,267	253
	Net Sales Area (sqm)	2,017	108	775	155
	#Units	19		5	

Table 21: Comparison Goods Provision at Town and District Centres

		Town Centres Avg Area / Units	Avg Size	District Centres Avg Area / Units	Avg Size
Bookshop	Total Area (sqm)	176	78	34	69
	Net Sales Area (sqm)	125	56	12	23
	#Units	2		1	
Chemist	Total Area (sqm)	1,257	148	183	97
	Net Sales Area (sqm)	680	80	78	42
	#Units	9		2	
Cycling	Total Area (sqm)	154	102	419	210
	Net Sales Area (sqm)	77	51	141	71
	#Units	2		2	
Footware	Total Area (sqm)	271	271	5	10
	Net Sales Area (sqm)	175	175	5	9
	#Units	1		1	
Furniture	Total Area (sqm)	2,430	177	175	77
	Net Sales Area (sqm)	1,521	111	109	48
	#Units	14		2	
Hardware	Total Area (sqm)	1,237	353	122	203
	Net Sales Area (sqm)	565	162	164	274
	#Units	4		1	
Jewellers	Total Area (sqm)	644	103	6	29
	Net Sales Area (sqm)	344	55	2	12
	#Units	6		0	
Other	Total Area (sqm)	1,877	142	133	52
	Net Sales Area (sqm)	1,062	80	67	26
	#Units	13		3	
Phones / Electronics	Total Area (Gross sqm)	736	123	-	-
	Sales Area (Net sqm)	280	47	-	-
	# Units	6		-	-
Various	Total Area (Gross sqm)	3,087	950	70	140
	Sales Area (Net sqm)	2,020	622	38	75
	# Units	3		1	
Clothing	Total Area (Gross sqm)	4,675	275	110	58

		Town Centres Avg Area / Units	Avg Size	District Centres Avg Area / Units	Avg Size
	Sales Area (Net sqm)	2,911	171	82	44
	# Units	17		2	
All	Total Area (Gross sqm)	16,544	2,722	1,257	944
	Sales Area (Net sqm)	9,760	1,610	697	622
	# Units	77	0	13	-

Table 22: Service Provision at Town and District Centres

		Town Centres Avg Area/ Units	Avg Size	District Centres Avg Area / Units	Avg Size
Shoe Repair	Total Area (sqm)	28	28	-	-
	Net Sales Area (sqm)	12	12	-	-
	#Units	1		-	
Hairdresser / Barber	Total Area (sqm)	1,405	63	254	63
	Net Sales Area (sqm)	869	39	130	33
	#Units	22		4	
Laundry / Dry Cleaning	Total Area (sqm)	27	54	44	73
	Net Sales Area (sqm)	17	34	6	9
	#Units	1		1	
Travel Agents	Total Area (sqm)	703	148	52	72
	Net Sales Area (sqm)	188	39	18	25
	#Units	5		1	
All	Total Area (sqm)	2,163	293	326	65
	Net Sales Area (sqm)	1,085	124	149	30
	#Units	29	-	5	

Table 23: Other services and facilities within Town and District Centres

		Town Centres Avg Area / Units	Avg Size	District Centres Avg Area / Units	Avg Size
Animal Care (grooming)	Total Area (sqm)	47	63	12	58
	Net Sales Area (sqm)	-	-	-	-
	#Units	1		0	
Betting Shop	Total Area (sqm)	584	137	151	110
	Net Sales Area (sqm)	-	-	-	-
	#Units	4		1	
Cafe Or Restaurant	Total Area (sqm)	2,793	119	437	118
	Net Sales Area (sqm)	-	-	16	4
	#Units	24		4	
Clinic	Total Area (sqm)	345	138	13	27
	Net Sales Area (sqm)	-	-	-	-
	#Units	3		1	
Dentists	Total Area (sqm)	493	219	32	87
	Net Sales Area (sqm)	-	-	-	-

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		Town Centres		District Centres	
		Avg Area / Units	Avg Size	Avg Area / Units	Avg Size
	#Units	2		0	
Doctors	Total Area (sqm)	436	249	151	403
	Net Sales Area (sqm)	-	-	-	-
	#Units	2		0	
Gymnasium Or Fitness Centre	Total Area (sqm)	341	195	93	372
	Net Sales Area (sqm)	-	-	-	-
	#Units	2		0	
Library	Total Area (sqm)	115	92	78	156
	Net Sales Area (sqm)	-	-	-	-
	#Units	1		1	
Post Office	Total Area (sqm)	38	38	-	-
	Net Sales Area (sqm)	-	-	-	-
	#Units	1		1	
Pre School Establishment	Total Area (sqm)	72	72	147	294
	Net Sales Area (sqm)	-	-	-	-
	#Units	1		1	
Public House	Total Area (sqm)	34	3	-	-
	Net Sales Area (sqm)	-	-	-	-
	#Units	11		2	
Social Club	Total Area (sqm)	1,000	400	279	557
	Net Sales Area (sqm)	-	-	-	-
	#Units	3		1	
Take Away Food Shop	Total Area (sqm)	1,201	74	268	77
	Net Sales Area (sqm)	-	-	-	-
	#Units	16		4	
Veterinary Surgery	Total Area (sqm)	-	0	41	62
	Net Sales Area (sqm)	-	0	-	-
	#Units	-		1	
All	Total Area (sqm)	7,498	1,799	1702	2,320
	Net Sales Area (sqm)	0	0	16.42857	4.42
	#Units	69.75	0	15.28929	0

Main food stores within North Tyneside

4.24 North Tyneside contains a number of large food stores both within and out of the main town centre areas.

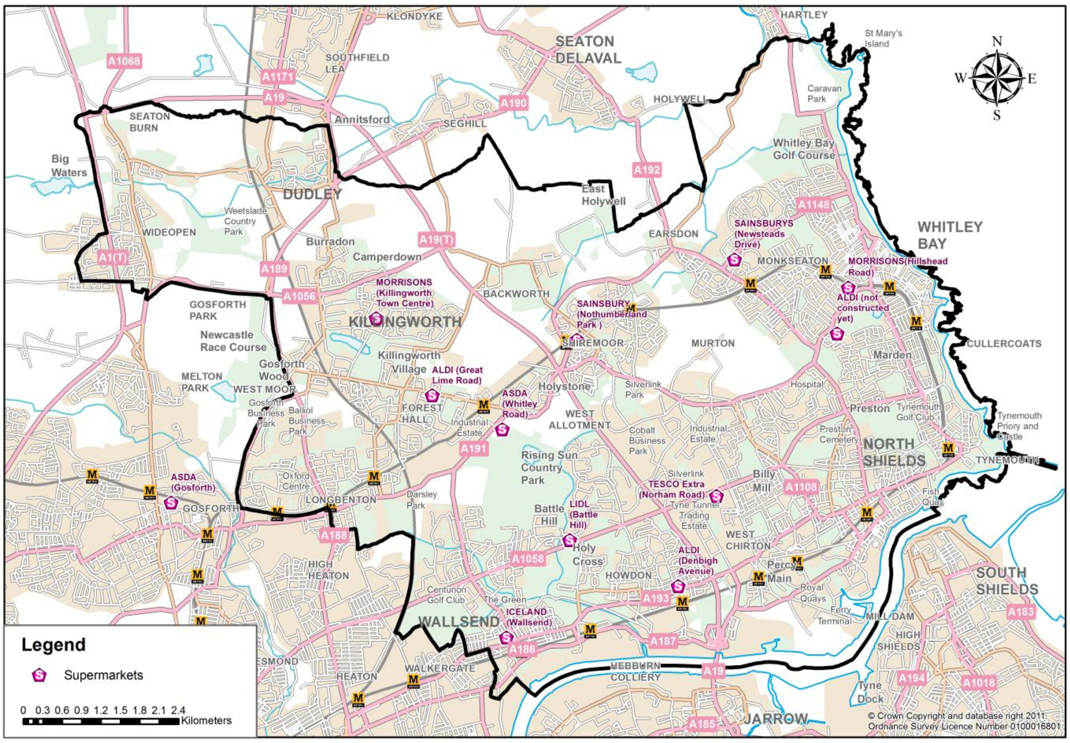

Figure 6- North Tyneside's Main Foodstores

Table 24: Convenience Foodstores within North Tyneside

Main Food stores within North Tyneside	Location of Store (in, edge or out of centre)
Asda Whitley Road, Benton	Out of centre
Morrions, Preston Grange District Centre	In centre
Morrisons Killingworth Town centre	In centre
Tesco Extra, Norham Road, North Shields	Out of centre
Sainsbury's, Newstead Drive, Whitley Bay	Out of centre
Morrisons, Hillsheads Road, Whitley Bay	Out of centre
Lidl, Battle Hill District Centre	In centre
Sainsbury's, Northumberland Park District Centre	In centre
Iceland Wallsend Town Centre	In centre

4.25 The Retail and Leisure Study (2015) outlined that the majority of foodstores within North Tyneside are now overtrading in line with benchmark turnover levels. Only the Sainsbury's stores in Newstead Drive (Whitley Bay) and Northumberland District Centre are trading below benchmark levels. However it is noted that the Retail and Leisure study (2015) does not account for smaller or independent traders. However due to the committed convenience goods floor space schemes the report concludes that the current over-trading will be largely eliminated.

4.26 Large foodstores by their nature have a large catchment area illustrated by the relatively low number of such stores within the Borough. However, in relation to the proposed strategic sites it is probable that the following stores already in place would provide the primary provision for new residents. These are Asda at Whitley Road, Benton; Morrisons at Killingworth Town Centre; Sainsbury's at Newstead's Drive; Morrison's at Hillhead's Road; and Aldi at Great Lime Road.

Conclusion

4.27 This section has provided an assessment of the typical number of existing homes served by the various retail centres and clusters within North Tyneside. Whilst there are a number of centres and shopping clusters which will help serve the new residents within the strategic sites there are also some small areas around the periphery which would benefit from further local retail provision. In addition to this, it was identified that North Tyneside's average retail catchments serve approximately 3,000 residences. With the influx of 3,000 homes within Murton and 2,000 homes within Killingworth, additional retail provision is key to providing a multifunctional, sustainable development.

4.28 This section also drew upon previous studies undertaken during the North Tyneside Retail and Leisure Study (2011) which reveal general patterns of spending both within and outside of the Borough. For comparison retailing, the main areas residents utilised are North Tyneside's Main town centres, the Silverlink and outside of the Borough to areas such as Newcastle City Centre. Results correlated with national trends in which comparison retailing tends to be less frequent as people are more willing to travel to particular destinations for what they require and often like to shop around in order to get the best deals.

4.29 In contrast, North Tyneside's convenience provision is widely accessible and located within a range of different areas including main town centres, district centres, local centres, parades, shopping clusters and out of centre locations. Whilst Preston Local centre is based around a large foodstore, all of the remaining local centres, parades and clusters contained small scale "top-up" convenience stores which suited day to day needs.

CAPITA

5. Existing centres influenced by new Strategic Allocations

Introduction

5.1 This section will identify the relevant centres and clusters of retail units which have the potential to serve new residents within the proposed strategic allocation sites at Murton and Killingworth Moor.

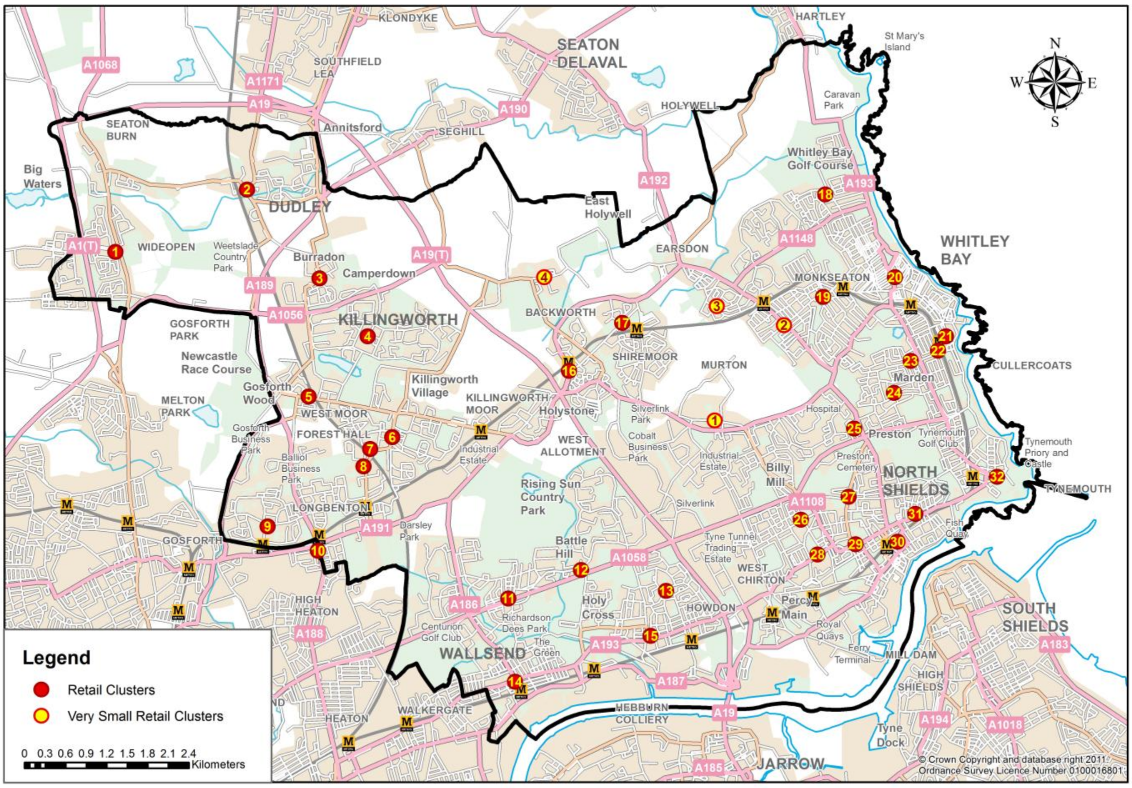

Figure 7- Retail Clusters within North Tyneside

Retail Centres within the Murton Catchment Area

Whitley Bay Town Centre

5.2 The Local Plan prioritises and supports the growth and regeneration of North Tyneside’s town centres. Whitley Bay Town Centre also falls within the Coastal Priority Investment and regeneration area which seeks to create a vibrant town centre along with proposals for the closely located Spanish City Dome and seafront. Out of the four town centres within North Tyneside, Whitley Bay demonstrates the healthiest vacancy rates with 47 (10.3%) vacant units recorded in November (2014). The centre contains a diverse number of retail offers including “top up” shops, Newsagents, Post Office, Pharmacies, Butchers, restaurants, takeaways, pubs and number of comparison and leisure units. The health check for Whitley Bay, published in the NTRLS (2011), concluded that overall the centre was reasonably healthy. In terms of qualitative deficiencies, NTRLS analysis identified an opportunity to enhance the quality of the retail offer to serve the more affluent areas of North Tyneside which are found within the catchment of Whitley Bay Town Centre. The proposed housing growth at Murton presents potential benefits to the centre with a greater influx of consumers.

Monkseaton District Centre

5.3 Monkseaton District centre performs well with the most retail/service units and highest Local Provision Index (as indicated within the 2014 Retail and Leisure Study). The district centre offers range of comparison retail including a number of hairdressers, decoration services, cafes and a pharmacy. The option for "top up" shopping is provided through the local Spa Store. The District Centre serves a large number of residences (6906) and whilst it performs well, room for expansion is limited due to the well-established surrounding residential areas.

Northumberland Park District Centre

5.4 Northumberland Park contains a number of comparison and convenience retail outlets which include a large foodstore (Sainsbury's (which is retailing under capacity)), takeaway, cafe, hairdressers and chemist. The district centre also benefits from excellent access to the Metro station thus promoting a sustainable pattern of development by reducing private car dependence. Northumberland Park measures approximately 4 hectares and has the potential for further expansion, potentially capable of supporting 10,000sqm to 15,000sqm of comparison retail floorspace. Expansion of Northumberland Park District Centre is supported by draft policy AS6.9 within the Local Plan (2015).

Preston Grange Local Centre

5.5 The Local Centre is made up of a large foodstore (Morrisons (Overtrading)), a post office, tanning parlour, vets practice, takeaway and one vacant store (former Blockbuster site). Bounded by established roads and residential areas, scope for expansion of the Local Centre is limited.

Shopping Parade: Earsdon Road (near Shiremoor centre)

5.6 This shopping parade is made up of a small cluster of local shops embedded within the existing residential developments. Two take away units, a car garage, Newsagents/ Post Office, Social Club and Carpet centre are provided within this shopping parade. As outlined previously the units are embedded within a well established residential area with little capacity for expansion.

Shopping Clusters

5.7 A number of small shopping clusters are located around the periphery of the Murton Strategic Allocation site. Figure 6 reveals the location of these shopping clusters. As identified on the map (1) there is a number of retail and service units along New York Road which include a pub/restaurant, take-away, "top-up" shop, newsagent/Post Office. Point number 2 on the map highlights the shopping cluster on Seatonville Road which hosts a "top-up" shop, two hairdressers, bakery, take-away, butchers, pharmacy, pub/restaurant and a commercial printing company. Point number 3 on the map highlights the retail cluster located on Wilton Drive which has five ground floor retail units including a beauty parlour, hairdressers, "top-up" shop and newsagents. The Silverlink Retail Park and Boundary Mills provides a large comparison goods offer to the nearby area.

New Developments within the Catchment Area

5.8 A planning application (ref: 14/01096/FUL) was permitted in 2014 for the Demolition of existing car sales garage and associated buildings and the construction of an Aldi Store with associated access, car parking and landscaping. The application includes 912 sqm of convenience goods floorspace and 228 sqm of comparison goods floorspace. This new retail allocation will help to serve the new population arising from the proposed housing growth.

Retail centres within the Killingworth Catchment Area

Killingworth Town Centre

5.9 Killingworth is identified as a principal town centre within the Local Plan with a high comparison goods turnover and a large number of retail units, benefitting from a 0% vacancy rate. The centre would potentially benefit from the influx of new residents with more capita spending within the town. The centre contains a diverse range of retail and leisure units including a Post Office/ newsagent, Pharmacy, Hairdressers, Charity shop and job centre. The centre benefits from a number of well-known high street brands including Matalan, Thortons, Select and Wilkinsons and also includes a large foodstore. The large foodstore (Morrisons) however has been identified as over-trading and would require expansion in order to accommodate future growth within the area.

Forrest Hall District Centre

5.10 Forrest Hal District Centre is made up of four “top up” convenience stores, a newsagent, nine take aways/restaurants, a public house, opticians, six hairdressers/beauty parlours, a bank, chemist, Post Office and a number of other town centre uses. The District centre is also closely located to a number of shopping parade clusters on Station Road and Forrest Hall Road. Due to the strategic location of the centre in relation to the proposed housing site, the potential to serve the new resident population is limited.

Northumberland Park District Centre

5.11 As outlined above Northumberland Park contains a number of comparison and convenience retail outlets which include a large foodstore (Sainsbury’s), takeaway, cafe, hairdressers and chemist. Expansion is encouraged and supported in line with the associated Killingworth and Murton strategic housing developments. Retention levels for the Borough’s retail spending as a whole could be improved through the reduction in leakage out to Newcastle and/or the Metro Centre.

Shopping Parade: Station Road and Forest Hall Road (Forrest Hall)

5.12 Two shopping parades on Station Road and Forest Hall Road are located within close proximity to Forest Hall’s designated District Centre (approximately 0.4 miles). Forrest Hall Road has a number of small scale independent units which include IT repairs, Hairdressers, takeaways, newsagent, beauty parlous, Bingo and social club. The clusters of shops located on Station Road include a Pharmacy, newsagent, restaurant, barbers, vets and funeral care. Both shopping parades serve the local community and are bounded by established residential developments making scope for expansion limited.

Shopping Parade: Armstrong Road (West Moor)

5.13 Armstrong Road has a cluster of seven small scale retail units made up of a betting shop, bakery, “top-up” shop, hairdressers/Barbers, florist, Newsagent/Post Office and beauty parlour. The shopping parade primarily serves the local community within West Moor and is bounded by established residential developments and railway therefore limiting its capabilities to serve an increased residential population.

Shopping Clusters

5.14 A shopping cluster (point 4 on figure 7) on Church Road hosts a “Top-up” shop/ Post Office, hairdressers, pharmacy and take-away. Due to the location of the cluster of shops it could potentially provide a small service to the western periphery of the proposed housing site. Similarly to Murton, The Silverlink Retail Park and Boundary Mills store provide a large comparison goods offer to the nearby area.

Use Analysis

5.15 Tables provided in Appendix 1 provide a town and district centre break down of the types of convenience and comparison retail use within the town centre. The most common convenience use within both town and district centres is general top-up convenience/ groceries stores. Bakeries and Butchers are also common with fish mongers and green grocers appearing less often within the centres. As expected town centres present a wider comparison retail offer. Chemists, furniture and clothes stores exist within the majority of the identified district centres. Whilst service provision is greatest within town centres, district centres do provide a number of service units, particularly hairdresser/barber units. 'Other uses' such as cafe's, dentists, gyms, doctors and post offices vary considerably between each town centre. The large majority of district centres do have cafe/restaurant units and doctors/dentist/clinic provision.

Conclusion

5.16 This section has highlighted the key centres, parades and clusters which may potentially be affected by the new strategic residential developments at Murton and Killingworth. The proposed extension Northumberland Park has significant potential to cater towards both the convenience and comparisons needs of the new residents. Benefits are also likely to be felt within two of North Tyneside's main town centres; Whitley Bay and Killingworth through the increase in resident population which may utilise the existing provision. A number of well established centres exist within close proximity to the two proposed strategic housing sites which will help to cater towards some of the retail requirement. The majority of Local Centres, shopping parades and existing clusters however have limited scope for expansion and due to their siting and locations are limited in how they can fully accommodate the needs of the proposed resident population.

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6. Establish the requirements for new retail provision at each Strategic Allocation.

Review of Existing Centres

6.1 Section 5 identified the various centres which would cater towards some of the retail needs required by new residents within both strategic allocations.

6.2 As outlined within this section, the existing centre at Northumberland Park provides some potential to serve the arising needs from both Murton and Killingworth Moor. The current superstore, Sainsbury's was recorded in the recent Retail and Leisure study (2014) as retailing at under capacity. Further to this, the emerging Local Plan supports the expansion of the centre to accommodate additional predominantly comparison, retail needs. Nearby provision such as Morrisons within Killingworth Town Centre and Morrisons within Preston's Local Centre are over-trading and have limited scope for expansion. In the remaining centres in North Tyneside, there is a very limited number and choice of convenience retailers present. Whilst there is a large number of out of centre convenience goods stores, they mainly cater for the bulk food shoppers rather than the local convenience market that the new strategic sites would require. Whilst some of the smaller shopping parades and clusters will help to absorb some of the requirement borne out of the new residential developments, their size and accessibility limit the potential for expansion.

6.3 The Silverlink retail park, Whitley Bay Town Centre, Killingworth Town Centre, Monkseaton District Centre, Forrest Hall District Centre and Boundary Mills Retail Park make up the key comparison retail destinations intended to serve the strategic sites. The Silverlink Retail Park, Northumberland Park and Boundary Mills site all have noteable capacity for comparison retail expansion.

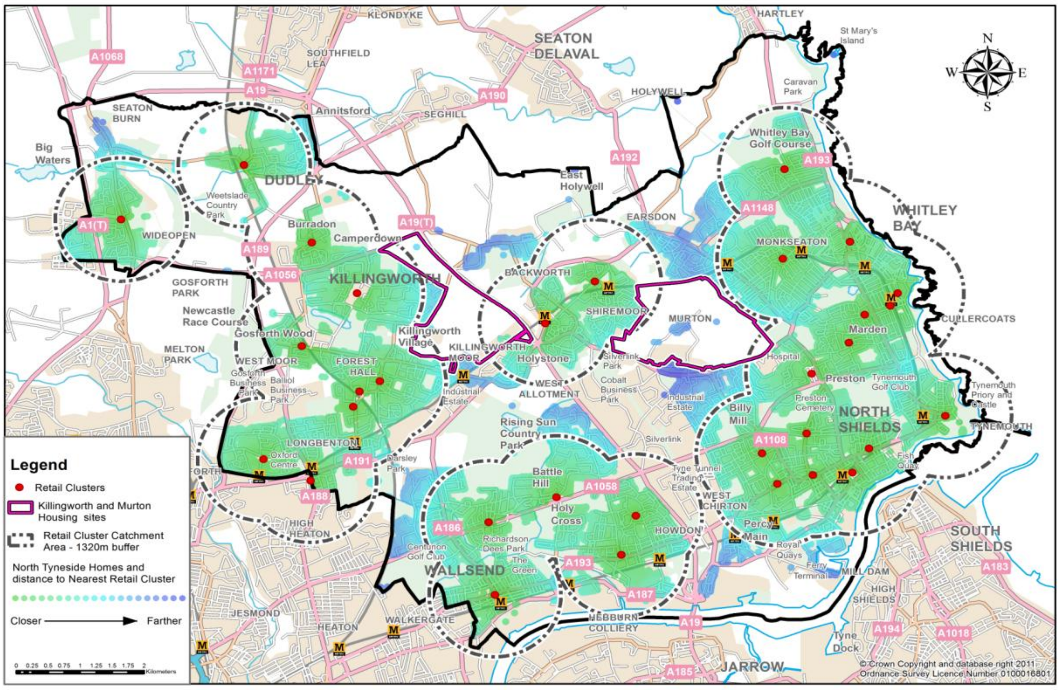

Figure 6 –Existing Centres I Catchments

6.4 The two maps above at Figure 7 illustrate the broad catchment of each Town Centre, District and Local Centre and other primary shopping parade within North Tyneside. Analysis of these and the dwellings accessible to each provides a broad understanding of the pattern and density of local communities and neighbourhoods within the Borough. This analysis has sought to take into consideration major barriers such as transport infrastructure and wider geography that would impact on connections.

6.5 As a general rule from the analysis of existing centres, approximately 90% of all dwellings within the Borough are located within 1,030 metres of a defined centre.

6.6 Key conclusions emerging from the analysis are that both Murton and Killingworth Moor are not generally well served by existing equivalent centres. Killingworth Moor potentially benefits from proximity to Northumberland Park, but this will be dependent upon quality of access across the A19, shiremoor by-pass and metro line.

Possible options for the optimum retail provision location

6.7 The possible positions for the new retail provision have been mapped in order to establish the ‘optimum’ location. The retail facilities need to be accessible for the new residents and strategically positioned to serve those existing areas which have been identified as being slightly more isolated from retail provision.

Murton

Option 1: Murton New York

6.8 The location of Option 1 would result in significant overlap with a number of existing catchment areas which would therefore limit the benefits to existing residents. The proposed retail area would be located away from the main access route into the site, potentially creating un-sustainable travel patterns. Its proposed position closely located to Whitley Bay High School and Rake Lane Hospital would increase pressure on New York Road whilst creating disturbance to existing community facilities.

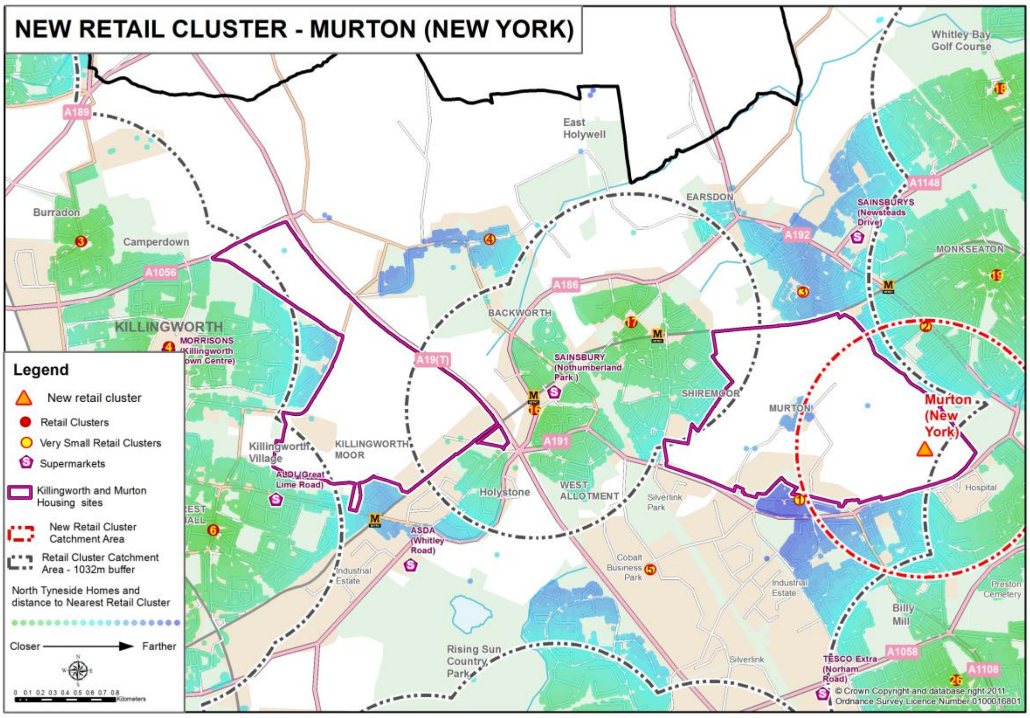

Figure 7- Murton Option 1: New York

Option 2: Murton Rake Lane

Option 2 would see the retail provision located on New York Road, within close proximity to New York and Murton social club and an existing cluster of retail services. The proposed location of the provision would be located within close proximity to the principal entrance of the site thus potentially raising congestion and accessibility issues.

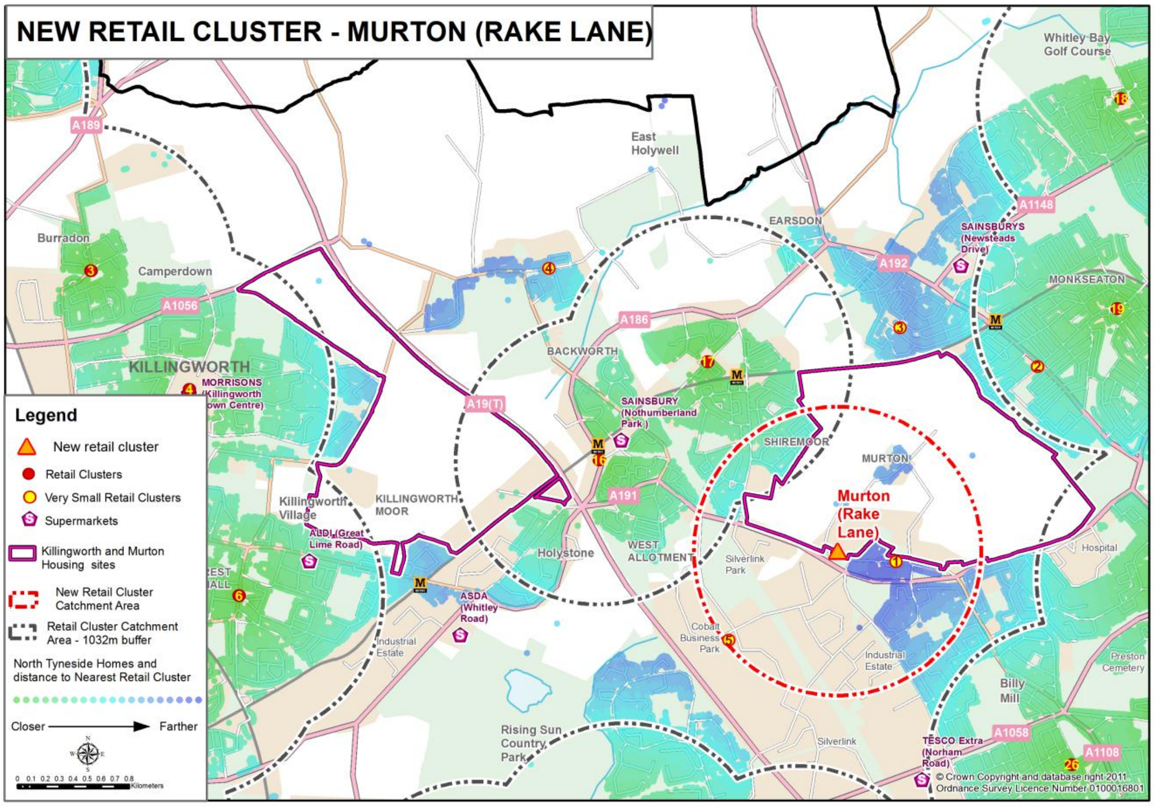

Figure 8- Murton Option 2: Rake Lane

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Option 3: Primary Access Route

6.10 Located along the Primary Access Route, option three would provide a sustainable and accessible site for new residents. The location would result in minimal overlap for the existing catchment areas and would help serve existing residents who have been identified as being slightly isolated from existing retail provision. In essence the location will help promote a sustainable pattern of development by allowing easy access to everyday goods for new and existing residents.

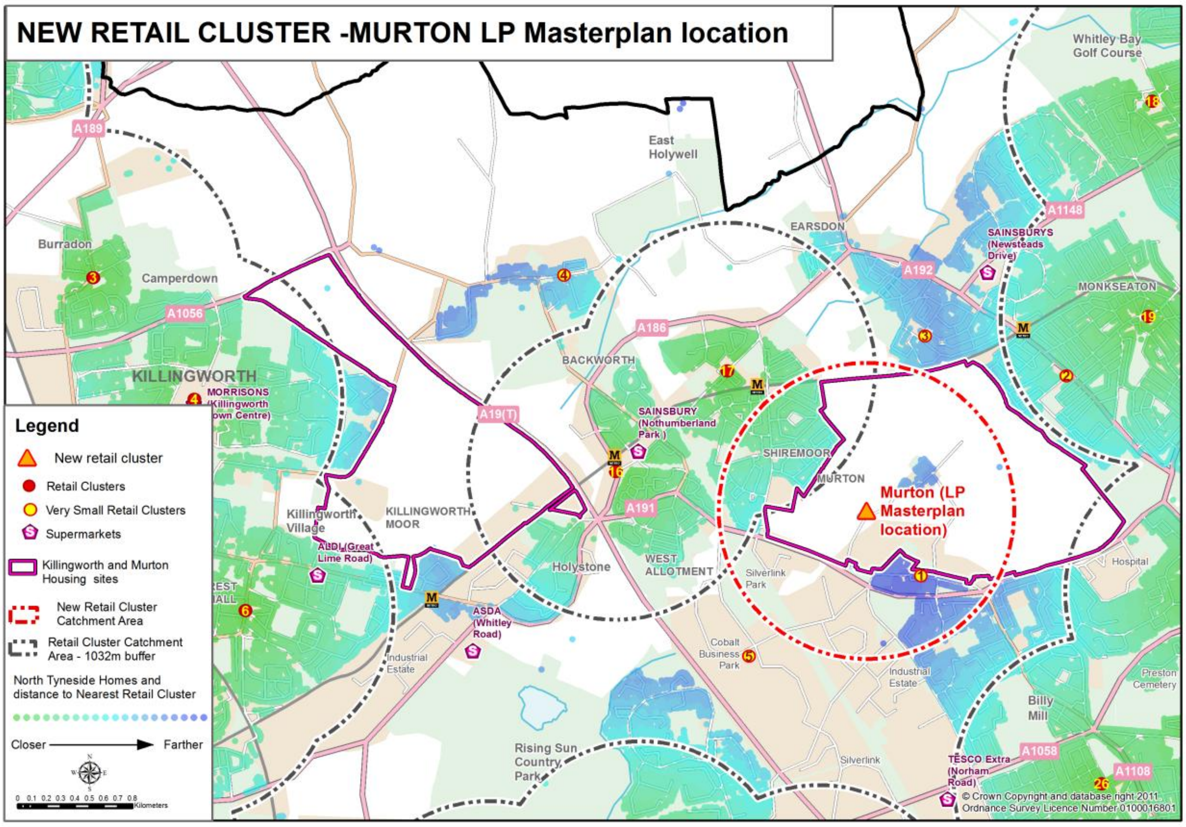

Figure 9- Murton Option 3: Primary Access Route

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Killingworth

Option 1: Killingworth Moor North

6.11 Located far north within the Killingworth Moor site, Option 1 would provide help to overcome some of the existing identified deficiencies. However, located in the far north of the new proposed site the proposed retail location may not provide the most favourable access for new residents. The proposed location would also create significant overlap with Killingworth Town Centre's catchment area.

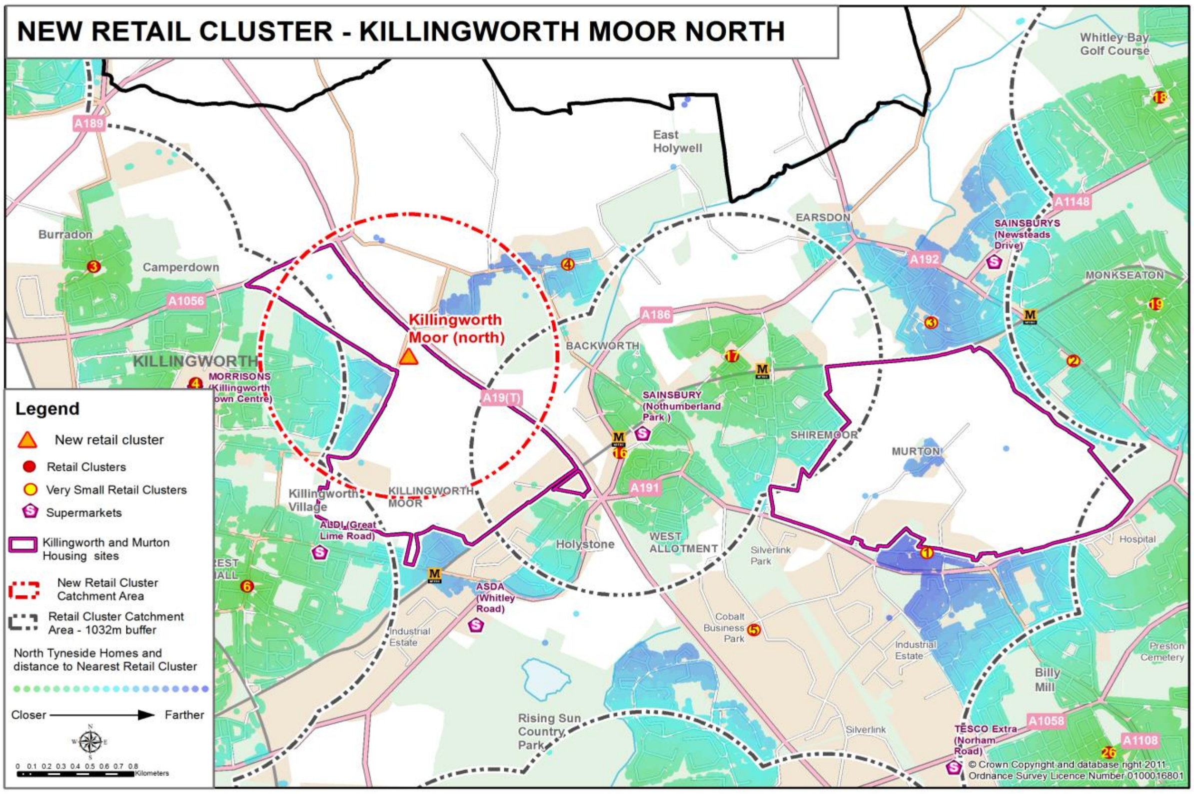

Figure 10- Killingworth Option 1: North

Option 2: Killingworth Moor South

6.12 Option 2 would see Killingworth's retail provision located within the South of the site. The proposed retail location would be closely located to public transport and would therefore aid sustainable transport patterns as it is accessible to existing services and benefits from proximity to the metro line. Despite this, the proposed location would overlap with many well served areas and would leave a large part of the new residents isolated from the new provision.

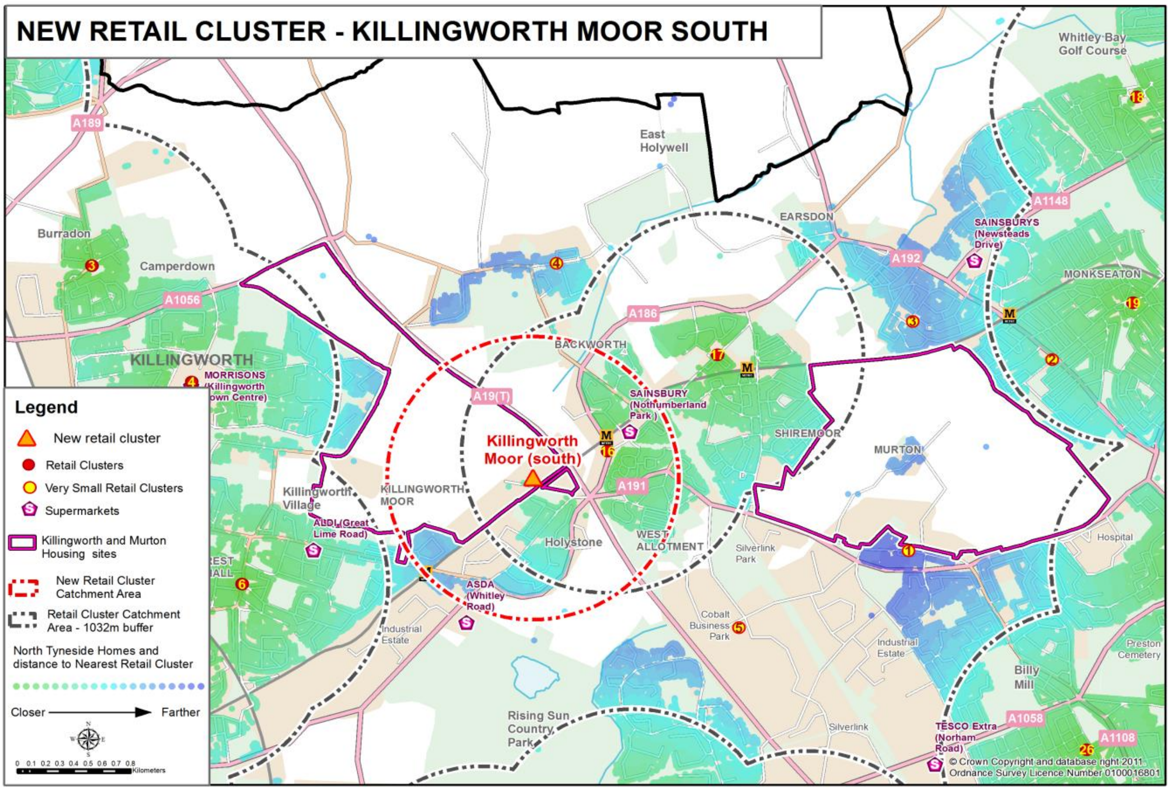

Figure 11- Option 2: South

Option 3: Killingworth Moor Central

6.13 Option 3 would see the retail provision located centrally within Killingworth Moor, serving the majority of the new residents. Whilst also potentially serving identified deficient areas unless specifically on a route likely to be used by those existing communities its location is unlikely to prove attractive to current residents.. The proposed location would help to reduce the need to travel for day-to-day retail needs, supporting the sustainability ambitions of the development.

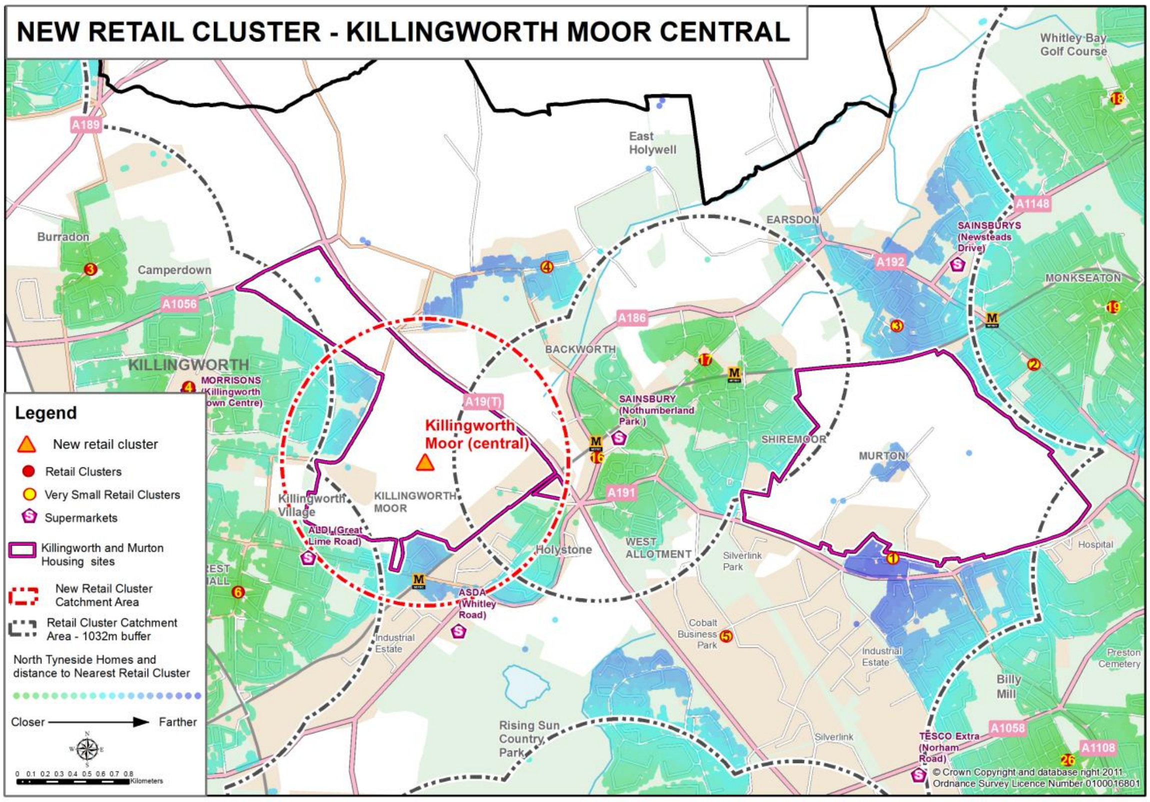

Figure 12- Option 3: Central

Potential Facilities

6.14 It is apparent that the two sites are surrounded by a number of comparison and convenience retail services. Despite this, with the significant influx of new residents combined with the sustainability objectives outlined in the NPPF there is a retail requirement which will help cater towards day-to-day shopping needs.

6.15 The proposed expansion of Northumberland Park and the Silverlink help to accommodate an expanding comparison retail need within close proximity to both strategic sites.

6.16 In the analysis of retail hierarchies within section 4, a pattern emerged in which District and Local centres within North Tyneside are often made up of various small-scale provision which include; top-up and convenience stores, Post Office, Pharmacy/Opticians and hairdressers. The analysis of quantitative provision at section 3 illustrates that at Murton the scope exists to potential incorporate a full range of such shops and facilities in addition to the potential for additional provision of wider services that could benefit the wider community and residents of new development. A lesser range of provision may be required at Killingworth Moor. However, this will be dependent upon the quality of access afforded from the site to Northumberland Park and Killingworth town centre.

7. Conclusions, impact assessment and sequential test

The Need for the Proposed Development

Quantitative Need

7.1 'Quantitative need' is conventionally measured as expenditure capacity, i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area. Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increases in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area. Section 3 details the outcome of this indicator which outlines a convenience goods floorspace requirement of 500 to 1,000sqm net at Murton and 300 to 500sqm net at Killingworth Moor.

Qualitative Need

7.2 The following indicators of qualitative need are relevant to the proposed development.

Improving the Accessibility to a Range of Retail Facilities

7.3 By broadening the range of shopping facilities within the catchment areas, the proposed development will also enable greater access to a range of retail facilities for the existing local community, particularly to the benefit of those who do not have access to private transport.

Reduced Travel Distances

7.4 Improving shopping facilities within the strategic sites would assist in meeting the aims of The NPPF, as well as Local Planning Policy aims in relation to reducing the number and length of car borne journeys associated with shopping activities.

Market Demand

7.5 It is relevant to take into account, as an indicator of need the national convenience goods retail trends which are currently witnessing a shift in demand from large superstores, to more localised top up shops. It is an indication of the market that the retail facilities within Murton and Killingworth will be welcomed and well used.

The Sequential Test

7.6 The National Planning Policy Framework emphasises that proposals for the retail development outside existing centres, and on sites not allocated for retail development in an up-to-date development plan, should demonstrate that a sequential approach to site selection has been adopted. This approach means that first preference should be given to town centre sites where available. Next preference should be for edge-of-centre sites, with preference given to sites that are well connected to the town centre. Only then should out-of-centre sites be considered. Appropriate options are those sites which are available within a reasonable time period, are suitable with regard to the type of development proposed, and which are viable.

7.7 In order to take a comprehensive approach to the initial assessments, section 5 provides details on the search that was conducted which incorporated all Town Centres, District Centres, Local Centres and shopping clusters within the catchment area of Murton and Killingworth. The proposed retail services form an integral part of the overall proposal for residential development by providing convenient day to day facilities for future residents of the development and the immediate surrounding area. As such they help the overall scheme achieve a sustainable mix of uses and for this reason their inclusion is fully justified and justified against paragraph 37, 38 and 70 of the National Planning Policy Framework. On the basis of the amount of floorspace proposed, the relationship of the proposed retail development to principally meet the needs of the future population of Killingworth Moor and Murton and the guidance from the National Planning Policy Framework the proposed retail floorspace would support sustainable development.

Impact Assessment

7.8 The assessment of impact reflects the advice contained within Paragraph 26 of the NPPF which states;

'When assessing applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date Local Plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sq m).This should include assessment of:

- *the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and*
- *the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from*

the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made.'

7.9 In line with this advice the Local Plan sets lower local thresholds based on its Retail and Leisure Study (2011 & 2014). DM6.10 states that;

'*Proposals for retail, leisure and office development outside a town centre will require an impact assessment where they would provide either:*

-500 sq m gross comparison floorspace, or more; or
-1,000 sq.m gross of retail floorspace for supermarkets/superstore, or more'

Murton

7.10 This report has identified a need for provision of a new centre delivering additional convenience floorspace between 500sqm and 1,000sqm net square metres. This floorspace may be delivered in a single unit but it is recommended to be a number of separate retail units. If the maximum proposal of 1000sqm net of convenience floorspace was to be proposed, it would reach the Councils locally set threshold and require an impact assessment with any future planning application. However, within the analysis of Section 3 the level of proposed floorspace takes into account the potential trade draw to existing town centres from the growth in population and from the expansion of Northumberland Park. It is after the potential impact on the existing centres has been considered that the proposed floorspace has been calculated. On this basis a future impact assessment for 1000sqm would not be required.

7.11 The emerging Local Plan outlines the adopted strategy for Northumberland Park, and in line with the NPPF it generally encourages economic development within its boundary. Within the Local Plan, site specific proposals are detailed regarding the expansion of Northumberland Park predominantly for comparison retail use.

7.12 Policy AS7.4 of the Local Plan refers to Northumberland Park District Centre as an important element of the new strategic housing development at both Murton and Killingworth. The comments were clearly framed with reference to the potential need of further retail provision within the two strategic sites in order to promote the sustainability of the site.

7.13 Northumberland District Centre has a healthy mix of uses providing a range of facilities. The main unit on the site comprises of a large superstore which has a large convenience floorspace and also caters towards some comparison retail needs. There are also a number of other town centre uses which include takeaway/cafe, Pharmacy, hairdressers and butchers.

7.14 Indeed it is also likely that given the site's proximity to the District Centre, those future residents of Murton themselves will use and support its facilities. This will have the effect of the development creating a positive spin-off and impact on the District Centre; potentially bolstering its future vitality and viability.

7.15 When the scale and offer of the centre is compared to the size of the retail proposed (which has a specific and localised top-up shopping role), then it is unlikely that its operations would undermine the current shopping offer currently present within the centre.

Killingworth

7.16 In line with the advice outlined above as the retail element of the scheme is less than 1,000 sq m of convenience floorspace, a detailed impact assessment does not need to be considered.

7.17 As with Murton, the analysis of section 3 for Killingworth takes into account the potential trade draw to existing town centres from the growth in population and the expansion of Northumberland Park. It is after the potential impact on existing centres has been considered that the proposed floorspace has been calculated.

Planning Application Requirements

7.18 The analysis demonstrates the clear potential for qualitative and quantitative improvements in retail provision. It is apparent that the residential growth will produce reasonable retail expectations which are required to meet the day-to-day needs of the new residents. This report has outlined a broad assessment of existing centres and impacts of the proposed new retail units.

7.19 The size of the proposed retail floorspace and relationship within the residential developments at both Murton and Killingworth are such that it supports the principles of sustainable development and promoting sustainable communities.

Overall Conclusions

7.22 On the basis of this report there is an identified quantitative and qualitative need for retail for the residential development of Killingworth and Murton. This retail need cannot be met solely within North Tyneside's existing centres. Proposals for retail provision within Murton and Killingworth are in compliance with both National Policy and Local Policy as set out within the emerging Local Plan.

CAPITA

Appendix 1

Convenience

Town Centres

		Whitley Bay	Wallsend	Killing-worth	North Shields	Avg Area/Units	Avg Size
General Groceries	Total Area (sqm)	4,077	3,202	-	4,749	4,009	293
	Net Sales Area (sqm)	1,705	2,224	-	2,453	2,127	156
	#Units	15	12	3	11	10	
Bakery	Total Area (sqm)	405	1,245	108	445	551	157
	Net Sales Area (sqm)	155	552	32	155	224	64
	#Units	5	4	1	4	4	
Butchers	Total Area (sqm)	423	191	-	281	224	99
	Net Sales Area (sqm)	77	90	-	158	81	36
	#Units	2	3	-	4	2	
Fish-monger	Total Area (sqm)	25	-	-	17	11	21
	Net Sales Area (sqm)	19	-	-	13	8	16
	#Units	1	-	-	1	1	
Green-grocer	Total Area (sqm)	41	408	-	253	176	100
	Net Sales Area (sqm)	38	192	-	125	89	51
	#Units	1	4	-	2	2	
Off-licence	Total Area (sqm)	-	-	-	266	66	133
	Net Sales Area (sqm)	-	-	-	79	20	40
	#Units	-	-	-	2	1	
All	Total Area (sqm)	4,971	5,047	108	6,011	4,034	215
	Net Sales Area (sqm)	1,994	3,058	32	2,983	2,017	108

	Whitley Bay	Wallsend	Killing-worth	North Shields	Avg Area/Units	Avg Size
#Units	24	23	4	24	19	

District Centres

		Whitley Lodge	Tyne-mouth	Preston Grange	N'umber-land Park	Monk-seaton	Long-benton	Forest Hall	Battle Hill	Avg Area / Units	Avg Size
General Groceries	Total Area (sqm)	520	577		2,835	570	701	1,464	1,968	1,233	411
	Net Sales Area (sqm)	346	319		1,742	389	366	856	1,453	782	261
	#Units	2	5	2	1	3	2	3	3	3	
Bakery	Total Area (sqm)	59	141	-	112	81	106	170	95	96	69
	Net Sales Area (sqm)	38	86	-	84	34	30	56	15	43	31
	#Units	1	3	-	1	2	1	2	1	1	
Butchers	Total Area (sqm)	-	-	-	113	-	-	-	66	22	89
	Net Sales Area (sqm)	-	-	-	84	-	-	-	12	12	48
	#Units	-	-	-	1	-	-	-	1	0	
Fish-monger	Total Area (sqm)	-	-	-	-	60	-	-	-	12	60
	Net Sales Area (sqm)	-	-	-	-	30	-	-	-	6	30
	#Units	-	-	-	-	1	-	-	-	0	
Green-	Total Area (sqm)	-	-	-	-	62	-	46	-	15	54

		Whitley Lodge	Tyne-mouth	Preston Grange	N'umber-land Park	Monk-seaton	Long-benton	Forest Hall	Battle Hill	Avg Area / Units	Avg Size
grocer	Net Sales Area (sqm)	-	-	-	-	50	-	28	-	11	39
	#Units	-	-	-	-	1	-	1	-	0	
Off-licence	Total Area (sqm)	-	58	-	-	-	336	-	-	66	131
	Net Sales Area (sqm)	-	43	-	-	-	141	-	-	31	61
	#Units	-	1	-	-	-	2	-	-	1	
All	Total Area (sqm)	579	776	-	3,059	772	1,142	1,680	2,128	1,267	253
	Net Sales Area (sqm)	384	448	-	1,910	503	537	940	1,480	775	155
	#Units	3	9	2	3	7	5	6	5	5	

CAPITA

Comparison

Town Centres

		Whitley Bay	Wallsend	Killingworth	North Shields	Avg Area / Units	Avg Size
Bookshop	**Total Area (sqm)**	218.68	204.13	79.55	203.62	176	78
	Net Sales Area (sqm)	176	106	100	119	125	56
	#Units	4	2	1	2	2	
Chemist	**Total Area (sqm)**	1724.7	1425.1	453.56	1423.14	1,257	148
	Net Sales Area (sqm)	889	733	220	878	680	80
	#Units	11	11	4	8	9	
Cycling	**Total Area (sqm)**	77.1	230.04	-	-	154	102
	Net Sales Area (sqm)	50	103	-	-	77	51
	#Units	1	2	-	-	2	
Footware	**Total Area (sqm)**	313.65	0	605.62	164.87	271	271
	Net Sales Area (sqm)	219	0	400	82	175	175
	#Units	2	0	1	1	1	
Furniture	**Total Area (sqm)**	2519.82	3642.8	0	3557.46	2,430	177
	Net Sales Area (sqm)	1470	2101	0	2512	1,521	111
	#Units	20	14	0	21	14	
Hardware	**Total Area (sqm)**	772.01	272.54	3069	835.16	1,237	353
	Net Sales Area (sqm)	439	106	1200	516	565	162
	#Units	5	3	1	5	4	
Jewellers	**Total Area (sqm)**	538.25	885.02	11.21	1140.11	644	103
	Net Sales Area (sqm)	267	568	10	530	344	55
	#Units	10	6	1	8	6	
Other	**Total Area (sqm)**	2570.42	1368.61	8.56	3558.87	1,877	142
	Net Sales Area (sqm)	1112	545	9	2583	1,062	80

CAPITA

		Whitley Bay	Wallsend	Killingworth	North Shields	Avg Area / Units	Avg Size
	#Units	26	9	1	17	13	
Phones / Electronics	Total Area (Gross sqm)	800.07	807.57	-	600.2	736	123
	Sales Area (Net sqm)	326	298	-	217	280	47
	# Units	5	6	-	7	6	
Various	Total Area (Gross sqm)	2896.53	2137.12	1434.49	5879.02	3,087	950
	Sales Area (Net sqm)	1644	1419	642	4376	2,020	622
	# Units	4	4	2	3	3	
Clothing	Total Area (Gross sqm)	4008.47	3561.12	7719.86	3410.77	4,675	275
	Sales Area (Net sqm)	1848	1788	5928	2080	2,911	171
	# Units	33	18	3	14	17	
All	Total Area (Gross sqm)	16,440	14,534	13,382	20,773	16,544	2,722
	Sales Area (Net sqm)	8,440	7,767	8,509	13,893	9,760	1,610
	# Units	121	75	14	86	77	0

District Centres

		Whitley Lodge	Tyne-mouth	Preston Grange	N'umber-land Park	Monk-seaton	Long-benton	Forest Hall	Battle Hill	Avg Area / Units	Avg Size
Bookshop	Total Area (sqm)	0	68.96	-	-	-	-	-	-	34	69
	Net Sales Area (sqm)	0	23	-	-	-	-	-	-	12	23
	#Units	0	1	-	-	-	-	-	-	1	
Chemist	Total Area (sqm)	94.4	223.92	110.5	111.3	234.43	170.78	394.53	121.31	183	97
	Net Sales Area (sqm)	43	63	70	84	94	88	168	16	78	42
	#Units	1	3	1	1	2	2	3	2	2	
Cycling	Total Area (sqm)	419.14	-	-	-	-	-	-	-	419	210
	Net Sales Area (sqm)	141	-	-	-	-	-	-	-	141	71
	#Units	2	-	-	-	-	-	-	-	2	

		Whitley Lodge	Tyne-mouth	Preston Grange	N'umber-land Park	Monk-seaton	Long-benton	Forest Hall	Battle Hill	Avg Area / Units	Avg Size
Footware	Total Area (sqm)	0	9.7	-	-	-	-	-	-	5	10
	Net Sales Area (sqm)	0	9	-	-	-	-	-	-	5	9
	#Units	0	1	-	-	-	-	-	-	1	
Furniture	Total Area (sqm)	113.1	286.14	-	339.44	394.66	-	91.2	-	175	77
	Net Sales Area (sqm)	48	158	-	256	241	-	63	-	109	48
	#Units	1	5	-	2	7	-	1	-	2	
Hardware	Total Area (sqm)	-	49.6	-	-	560.7	-	-	-	122	203
	Net Sales Area (sqm)	-	30	-	-	791	-	-	-	164	274
	#Units	-	1	-	-	2	-	-	-	1	
Jewellers	Total Area (sqm)	-	0	-	-	28.5	-	-	-	6	29
	Net Sales Area (sqm)	-	0	-	-	12	-	-	-	2	12
	#Units	-	0	-	-	1	-	-	-	0	
Other	Total Area (sqm)	98.4	167.24	77.6	-	469.79	-	118.64	-	133	52
	Net Sales Area (sqm)	36	136	44	-	215	-	37	-	67	26
	#Units	1	6	1	-	8	-	2	-	3	
Phones / Electronics	Total Area (sqm)									-	-
	Net Sales Area (sqm)	-	-	-	-	-	-	-	-	-	-
	#Units	-	-	-	-	-	-	-	-	-	-
Various	Total Area (sqm)	-	140.1	-	-	-	-	-	-	70	140
	Net Sales Area (sqm)	-	75	-	-	-	-	-	-	38	75
	#Units	-	1	-	-	-	-	-	-	1	
Clothing	Total Area (sqm)	32.33	199.55	-	223.16	197.92	0	224.5	0	110	58
	Net Sales Area (sqm)	23	213	-	160	121	0	137	0	82	44
	#Units	1	6	-	2	3	0	3	0	2	
All	Total Area (sqm)	757	1,145	188	674	1,886	171	829	121	1,257	944

	Whitley Lodge	Tyne-mouth	Preston Grange	N'umber-land Park	Monk-seaton	Long-benton	Forest Hall	Battle Hill	Avg Area / Units	Avg Size
Net Sales Area (sqm)	291	707	114	500	1,474	88	405	16	697	622
#Units	6	24	2	5	23	2	9	2	13	-

Services

Town Centres

		Whitley Bay	Wallsend	Killingworth	North Shields	Avg Area / Units	Avg Size
Shoe Repair	Total Area (sqm)	48	-		34	28	28
	Net Sales Area (sqm)	30	-		5	12	12
	#Units	2	-		1	1	
Hairdresser / Barber	Total Area (sqm)	2,292	1,678	134	1,515	1,405	63
	Net Sales Area (sqm)	1,351	1,036	122	965	869	39
	#Units	34	29	3	23	22	
Laundry / Dry Cleaning	Total Area (sqm)	74	35	-	-	27	54
	Net Sales Area (sqm)	35	33	-	-	17	34
	#Units	1	1	-	-	1	
Travel Agents	Total Area (sqm)	473	1,319	236	785	703	148
	Net Sales Area (sqm)	140	267	174	169	188	39
	#Units	4	7	3	5	5	
All	Total Area (sqm)	2,887	3,032	370	2,335	2,163	293
	Net Sales Area (sqm)	1,556	1,336	296	1,139	1,085	124

	Whitley Bay	Wallsend	Killingworth	North Shields	Avg Area / Units	Avg Size
#Units	41	37	6	29	29	-

District Centres

		Whitley Lodge	Tynemouth	Preston Grange	Northumberland Park	Monkseaton	Longbenton	Forest Hall	Battle Hill	Avg Area / Units	Avg Size
Shoe Repair	Total Area (sqm)	-	-	-	-	-	-	-	-	-	-
	Net Sales Area (sqm)	-	-	-	-	-	-	-	-	-	-
	#Units	-	-	-	-	-	-	-	-	-	
Hairdresser / Barber	Total Area (sqm)	116.05	437.94	110	222.66	490.4	79.75	424.92	147	254	63
	Net Sales Area (sqm)	94	220	71	130	288	24	173	43	130	33
	#Units	2	10	1	1	9	1	7	1	4	
Laundry / Dry Cleaning	Total Area (sqm)	94.9	0	93.33	0	29.6	-	-	-	44	73
	Net Sales Area (sqm)	7	0	12	0	9	-	-	-	6	9
	#Units	1	0	1	0	1	-	-	-	1	
Travel Agents	Total Area (sqm)	106.07	172.3	0	0	28.2	0	54.75		52	72
	Net Sales Area (sqm)	38	36	0	0	26	0	23		18	25
	#Units	1	2	0	0	1	0	1		1	
All	Total Area (sqm)	317.02	610.24	203.33	222.66	548.2	79.75	479.67	147	326	65
	Net Sales Area (sqm)	139	256	83	130	323	24	196	43	149	30
	#Units	4	12	2	1	11	1	8	1	5	

CAPITA

Other Uses

Town Centre

		Whitley B	Wallsend	Killingworth	North Shields	Avg Area / Units	Avg Size
Animal Care (grooming)	**Total Area (sqm)**	87.8	0	0	101	47	63
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	2	0	0	1	1	
Betting Shop	**Total Area (sqm)**	457.91	1018.93	254.69	603.46	584	137
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	4	7	1	5	4	
Cafe Or Restaurant	**Total Area (sqm)**	6653.23	1225.81	657.01	2634.38	2,793	119
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	53	14	3	24	24	
Clinic	**Total Area (sqm)**	435.8	571.55	188.8	183.99	345	138
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	3	3	1	3	3	

CAPITA

		Whitley B	Wallsend	Killingworth	North Shields	Avg Area / Units	Avg Size
Dentists	**Total Area (sqm)**	833.62	326	205.25	606.63	493	219
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	3	2	1	3	2	
Doctors	**Total Area (sqm)**	601.82	0	750.9	391.1	436	249
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	3	0	3	1	2	
Gymnasium Or Fitness Centre	**Total Area (sqm)**	344.24	512.1	312.18	194.57	341	195
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	2	1	1	3	2	
Library	**Total Area (sqm)**	0	0	460.1	0	115	92
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	1	2	1	1	1	
Post Office	**Total Area (sqm)**	0	0	0	153.7	38	38
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	1	0	1	2	1	
Pre School Establishment	**Total Area (sqm)**	0	115.85	174	0	72	72
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	1	1	1	1	1	
Public House	**Total Area (sqm)**	134.6	0	0	0	34	3
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	23	6	1	14	11	

CAPITA

		Whitley B	Wallsend	Killingworth	North Shields	Avg Area / Units	Avg Size
Social Club	**Total Area (sqm)**	1322.27	1968.2	0	709.5	1,000	400
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	6	3	0	1	3	
Take Away Food Shop	**Total Area (sqm)**	1784.26	2021.22	0	998.26	1,201	74
	Net Sales Area (sqm)	0	0	0	0	-	-
	#Units	23	27	0	15	16	
Veterinary Surgery	**Total Area (sqm)**			0		-	0
	Net Sales Area (sqm)			0		-	0
	#Units			0		-	
All	**Total Area (sqm)**	12655.55	7759.66	3002.93	6576.59	7,498	1,799
	Net Sales Area (sqm)	0	0	0	0	0	0
	#Units	125	66	14	74	69.75	0

District Centres

		Whitley Lodge	Tynemouth	Preston Grange	Northumberland Park	Monk-seaton	Longb-enton	Forest Hall	Battle Hill	Avg Area / Units	Avg Size
Animal Care (grooming)	**Total Area (sqm)**	0	0	0	0	57.9				12	58
	Net Sales Area (sqm)	0	0	0	0	0				-	-

CAPITA

		Whitley Lodge	Tynemouth	Preston Grange	Northumberland Park	Monk-seaton	Longb-enton	Forest Hall	Battle Hill	Avg Area / Units	Avg Size
	#Units	0	0	0	0	1				0	
Betting Shop	**Total Area (sqm)**	97.31	42.4	112.09	110.69	224.3	319.06	159.31	146	151	110
	Net Sales Area (sqm)	0	0	0	0	0	0	0	0	-	-
	#Units	1	1	1	1	2	2	2	1	1	
Cafe Or Restaurant	**Total Area (sqm)**	2006.75	314.65	0	111.42	131.38	100.87	394.06		437	118
	Net Sales Area (sqm)	115	0	0	0	0	0	0		16	4
	#Units	17	2	0	1	2	1	3		4	
Clinic	**Total Area (sqm)**	45.29	0	0	0	0	34.62			13	27
	Net Sales Area (sqm)	0	0	0	0	0	0			-	-
	#Units	1	0	0	0	0	2			1	
Dentists	**Total Area (sqm)**	0	0	0	0	133.66	0	53.56	72.38	32	87
	Net Sales Area (sqm)	0	0	0	0	0	0	0	0	-	-
	#Units	0	0	0	0	1	0	1	1	0	
Doctors	**Total Area (sqm)**	0	189.6	0	0	0	446.89	0	573	151	403
	Net Sales Area (sqm)	0	0	0	0	0	0	0	0	-	-
	#Units	0	1	0	0	0	1	0	1	0	
Gymnasium Or Fitness Centre	**Total Area (sqm)**	473.6	0	0	0	0	0	0	270	93	372
	Net Sales Area (sqm)	0	0	0	0	0	0	0	0	-	-
	#Units	1	0	0	0	0	0	0	1	0	
Library	**Total Area (sqm)**	0	0	0	0	0	355	0	270	78	156
	Net Sales Area (sqm)	0	0	0	0	0	0	0	0	-	-
	#Units	0	1	0	0	1	1	0	1	1	
Post Office	**Total Area (sqm)**	0	0	0	0	0	0	0	0	-	-
	Net Sales Area (sqm)	0	0	0	0	0	0	0	0	-	-
	#Units	0	0	1	0	0	1	1	1	1	
Pre School	**Total Area (sqm)**	0	342.64	0	0	389.35	149.12			147	294

CAPITA

		Whitley Lodge	Tynemouth	Preston Grange	Northumberland Park	Monk-seaton	Longb-enton	Forest Hall	Battle Hill	Avg Area / Units	Avg Size
Establishment	**Net Sales Area (sqm)**	0	0	0	0	0	0			-	-
	#Units	0	1	0	0	1	1			1	
Public House	**Total Area (sqm)**	0	0	0	0	0		0		-	-
	Net Sales Area (sqm)	0	0	0	0	0		0		-	-
	#Units	1	9	0	0	3		1		2	
Social Club	**Total Area (sqm)**	0	557.4							279	557
	Net Sales Area (sqm)	0	0							-	-
	#Units	0	1							1	
Take Away Food Shop	**Total Area (sqm)**	221.3	386.6	93.2	111.2	313.4	328.8	375.84	312	268	77
	Net Sales Area (sqm)	0	0	0	0	0	0	0	0	-	-
	#Units	4	4	1	1	4	4	6	4	4	
Veterinary Surgery	**Total Area (sqm)**	0	41.9	81.7						41	62
	Net Sales Area (sqm)	0	0	0						-	-
	#Units	0	1	1						1	
All	**Total Area (sqm)**	2844.25	1875	286.99	333.31	1250	1734	982.77	1646	1702	2,320
	Net Sales Area (sqm)	115	0	0	0	0	0	0	0	16.42857	4.42
	#Units	25	21	4	3	15	13	14	10	15.28929	0