

# Huntingdonshire District Council

## Huntingdonshire Retail Study 2013

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# 1 Introduction

- 1.1 Deloitte LLP was instructed by Huntingdonshire District Council (HDC) to undertake a new Retail Study for the District. The purpose of the Study is to provide a basis for retail planning in the District and to assess the potential for additional convenience and comparison goods floorspace within the District during the period of emerging Local Plan. It will form part of the evidence base for the emerging Huntingdonshire Local Plan, as well as providing a basis for considering planning applications for retail development. The emerging Local Plan will replace existing and emerging Local Development Framework Development Plan Documents and make provision for future retailing within the District.
- 1.2 The Study has regard to the methodology of the Roger Tym and Partners (RTP) Huntingdonshire Retail Development Advice Report 2010 (RTP Report 2010) and previous studies, and makes use of material from these studies (in particular Household Telephone Interview Studies), where appropriate.
- 1.3 It is important to note, however, that since the RTP Studies the economic recession has persisted, and major changes in the structure of retailing are continuing to take place that are affecting the 'High Street' in particular. These issues are addressed in this Report and need to be considered alongside the quantitative economic forecasts within the Report.

## Study Context

- 1.4 A new Study was considered necessary to assess changes that have occurred in and around the District since the publication of the RTP Studies and to consider the implications of evolving retail and other development proposals within the District.
- 1.5 The RTP Report 2010 was an update of an earlier RTP 2007 Study. The 2010 Study Update noted that:

*"There have been a significant number of important changes since we completed our last study in 2007. In particular, forecasters' estimates of future retail expenditure growth have been revised in the light of the global recession. The policy context has also changed significantly, with the Huntingdonshire Core Strategy being adopted in September 2009 and a draft Area Action Plan for Huntingdon West area emerging shortly thereafter. The Government's long-awaited PPS4, which provides the national policy statement in relation to planning for sustainable economic development and town centres, was also finally published in December 2009".*

- 1.6 This 2013 Study considers further changes in national retail planning guidance and the continuing effects of the global economic recession.
- 1.7 The Council has also indicated a number of changes that have taken place within the District since the RTP 2010 Study, to which this Study should have regard. These include:
- § Structural changes in the retail sector;
  - § Introduction of the Localism Act requiring Local Authorities to co-operate with various other bodies including neighbouring councils;
  - § Transportation improvements, including the St Ives-Cambridge Busway and upgraded A421, that may have influenced shopping patterns between Huntingdonshire centres, Cambridge and Milton Keynes;
  - § Implementation of new retail facilities within the District, including a new Tesco foodstore in Ramsey, a small Co-op foodstore in Godmanchester, and B&Q at Huntingdon Retail Park.
- 1.8 There are also a number of proposals for additional retail provision to be made in the Draft Local Plan Stage 3 Consultation 2013. We refer to those included in the Stage 2 Strategy and Policy Consultation 2012 in Section 3 of this report.
- 1.9 We have had regard to the changes identified by the Council, and comment as appropriate on the retail proposals to be included in the Draft Local Plan in the context of the findings of this Study.

# 2 Planning Policy Framework

- 2.1 In this Section we describe the national and local retail planning policy framework of relevance to this Retail Study.
- 2.2 The RTP Report 2010 was based on the national planning policy context provided by PPS4 'Planning for Sustainable Economic Growth', 2009, and the Regional Spatial Strategy for the East of England published in May 2008. The 2010 report was an update of previous RTP reports prepared in 2005 and 2007, which were evidence for the Core Strategy that had been adopted in September 2009. Subsequently the Huntingdon West Area Action Plan was adopted in February 2011.
- 2.3 PSS4 was replaced following the publication of the National Planning Policy Framework (NPPF) in March 2012. The Regional Spatial Strategy for the East of England was formally revoked on 3 January 2013.
- 2.4 The requirements of national retail policy of relevance to this Study remain broadly unchanged from those in place at the time of the RTP Report 2010. The NPPF reiterates the PPS4 retail policy requirements, but in a more streamlined form with some modifications.

## National Planning Policy Framework (2012)

- 2.5 The NPPF (paragraph 150) states that Local Plans are the key to delivering sustainable development and that planning decisions must be taken in accordance with the development plan, unless material considerations indicate otherwise.
- 2.6 The Local Plan should be based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area, taking account of relevant market and economic signals (paragraph 158).
- 2.7 Paragraphs 23 to 27 of the NPPF provide guidance on the promotion of the vitality and viability of town centres, with paragraph 23 setting out specific planning policy considerations for planning authorities when drawing up Local Plans. These are:
- § *“Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;*
  - § *Define a network and hierarchy of centres that is resilient to anticipated future economic changes;*

- § *Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;*
  - § *Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;*
  - § *Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;*
  - § *Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;*
  - § *Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;*
  - § *Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;*
  - § *Recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and,*
  - § *Where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.”*
- 2.8 Although it has not been part of our remit to address the above issues in this Study, it will be important for the Council to consider how these matters are addressed in the emerging Local Plan.
- 2.9 Paragraphs 24-26 of the NPPF describe sequential approach and impact tests that are broadly similar to, but a simplified version of, the tests in PPS4. They are most applicable to the consideration of planning applications.
- 2.10 In preparing a Local Plan the NPPF (paragraph 156) requires the Council to include strategic policies to deliver the provision of retail, leisure and other commercial development.
- 2.11 Paragraph 157 of the NPPF states that Local Plans should:
- § *plan positively for the development and infrastructure required in the area to meet objectives, principles and policies of the Framework;*
  - § *be drawn up over an appropriate time scale, preferably a 15 year time horizon, take account of longer term requirements, and be kept up to date;*
  - § *be based on co-operation with neighbouring authorities, public, voluntary and private sector organisations;*
  - § *indicate broad locations for strategic development on a key diagram and land-use designations on a proposals map;*
  - § *allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate.*



## Practice Guidance on Need, Impact and the Sequential Approach

- 2.12 The Practice Guidance on Need, Impact and the Sequential Approach was originally published in December 2009 in conjunction with Planning Policy Statement 4: Planning for Sustainable Economic Growth. PPS4 was replaced upon publication of the NPPF in March 2012. However, it is our understanding that the Practice Guidance remains in force where it does not conflict with the NPPF. Lord Taylor in his December 2012 report on planning practice guidance recommends that this is retained until replaced by revised guidance. Where there is a perceived conflict between the NPPF and the Practice Guidance, the NPPF should take precedence.
- 2.13 This Study, including the quantitative assessment methodology outlined in Section 7 and Appendix 2, has been undertaken in accordance with both the requirements of the NPPF and the Practice Guidance.

## LDF Core Strategy 2009

- 2.14 The Huntingdonshire Core Strategy was adopted in September 2009 and sets the spatial framework for the District up to 2026. The Core Strategy seeks to shape the provision of housing development, services, economic growth and environmental improvements within Huntingdonshire over this period. The Core Strategy contains 10 principal policies.

### ***Retail Floorspace Requirements***

- 2.15 Policy CS8 of the Core Strategy sets out the retail and town centre uses requirements for the District. This Policy is copied below for information.

#### *“Retail and Town Centre Uses*

*At least 20,000m<sup>2</sup> of comparison floorspace and 4,000m<sup>2</sup> of convenience floorspace will be provided before 2026. As part of the overall development strategy to concentrate the majority of growth in the Huntingdon and St Neots Spatial Planning Areas it is proposed to locate retail development in the following areas whilst observing environmental designations and constraints:*

*At least 9,000m<sup>2</sup> of comparison floorspace will be located in Huntingdon, concentrated in the town centre with priority given to the further development and improvement of retail facilities at Chequers Court. Complementary and appropriate development, that does not jeopardise the delivery of further redevelopment of Chequers Court, will be located in a significant mixed use redevelopment in the area west of the town centre covered by the Huntingdon West Area Action Plan;*

*At least 9,000m<sup>2</sup> of comparison floorspace will be located in St Neots, with priority given to proposals in the town centre. Complementary and appropriate development will be located as part of a significant mixed use urban extension on Greenfield land to the east of the town;*

*At least 2,000m<sup>2</sup> of comparison floorspace will be located in St Ives concentrated in the town centre;*

*and*

*At least 4,000m<sup>2</sup> of convenience floorspace primarily in town centres across the District.”*

- 2.16 The forecasts were derived from the RTP 'Update of the Huntingdonshire Retail Assessment Study 2005' published in April 2007. The position set out by the 2007 Study was updated within the RTP 2010 Report. The capacity projections set out within the RTP Report 2010 are consistent with those outlined within the Core Strategy.
- 2.17 We describe in Section 7 the changes that have occurred since the Roger Tym 2010 Report, which underlie the reasons for the revised forecasts in this Study.

### ***Retail hierarchy***

- 2.18 There is no formally identified retail hierarchy within the District. However, Policy CS3 of the Core Strategy provides for a settlement hierarchy and identifies Huntingdon, St Neots, St Ives, and Ramsey and Bury as the four market towns within which all scales of development may be appropriate. The Core Strategy also indicates that Huntingdon functions as the primary shopping centre for the District (paragraph 3.4). In terms of popularity and floorspace St Neots is the next largest centre, followed by St Ives and then Ramsey.

## **Huntingdon West Action Area Plan 2011**

- 2.19 The Huntingdon West Area Action Plan adopted in February 2011 covers an area of land of approximately 300 hectares to the west of the town centre. The purpose of the AAP is to deliver planned growth, stimulate regeneration, protect areas sensitive to change and resolve potentially conflicting issues in the area that is a key gateway for the town. The development of this part of Huntingdon will help to facilitate a new link road to the west of the Town Centre that has been granted planning permission. The link road will enable a change of travel patterns such that the ring road becomes less of a barrier.
- 2.20 Policy HW4 of the Area Action Plan specifies that an area of land to the north of Brampton Road and George Street will be suitable for up to 5,350 sq. m net retail sales floorspace, providing that this is complementary to the continued vitality and viability of the town centre and does not jeopardise the delivery of further redevelopment at Chequers Court. This figure of 5,350 sq. m net sales floorspace roughly equates to the retail sales floorspace provided within Planning Application 1001750FUL. The total net floorspace proposed as part of this development is a Sainsburys store of 5,275 sq. m (as a replacement for the current Chequers Court store) and additional retail units (A1-A3) of up to 1,094 sq. m gross. This planning application floorspace is allowed for within the quantitative assessment.

## Urban Design Frameworks

- 2.21 The Council has prepared Urban Design Frameworks (UDFs) for areas of change within the District, for example St Neots Eastern Expansion Area 2010 and St Ives West 2012. The retail proposals within the UDFs are being carried forward into the Draft Local Plan, and we have regard to them therefore in the context of the Local Plan.

## Alconbury Enterprise Zone

- 2.22 In August 2011 a 150ha area around a former airfield to the north of Huntingdon was selected as one of the government's Enterprise Zones. A review of the Core Strategy has been prompted by the establishment of the Enterprise Zone. Plans for the Enterprise Zone, together with surrounding land have been developed, and a planning application (1201158OUT) has subsequently been lodged for the development of 'Alconbury Weald'. The planning application envisages some 5,000 homes together with 150ha of employment and up to 7,000 sq. m of retail use (Classes A1/A2/A3/A4/A5), of which the largest store will not be more than 1,500 sq. m gross floorspace. The need for retail provision in this area, to be identified within the Draft Local Plan, is considered in this report.

# 3 Draft Huntingdonshire Local Plan

## Status and Programme

- 3.1 In accordance with statutory requirements, the Council has commenced preparation of a Local Plan to 2036 to replace its existing development plan documents. The plan will set out the strategy for development in the whole of Huntingdonshire, incorporating policies for managing development and site-specific proposals for different forms of development in the context of the new NPPF. It will also include consideration of opportunities that have arisen since the Core Strategy was adopted in 2009, including those within the Alconbury Enterprise Zone.
- 3.2 Following preparation of an Initial Consultation Options document (Stage 1 Consultation), the Council undertook a Stage 2 Consultation on Strategy and Policy. The Stage 2 Consultation was completed on 23 November 2012. Further consultation (Stage 3) on the Draft Local Plan is proposed following consideration of this Retail Study.
- 3.3 We refer below to retail policies and proposals within the Stage 2 Consultation document that are of relevance to this Study. We have taken these proposals into account in the study and comment upon them further within our findings.

## Retail Policies and Proposals

### *Huntingdon Town Centre*

- 3.4 **Policy HU22** provides for some 10,000 sq. m of additional retail floorspace in the Chequers Court area. This is consistent with the Chequers Court Planning Brief adopted in 2010. Consents have been granted for some redevelopment of the area (1100979FUL and 1001751OUT), which together provide for some additional 6,500 sq. m retail floorspace. The remaining 3,500 sq. m of retail floorspace would involve further redevelopment of car parking areas.

### **Huntingdon West**

- 3.5 As noted in Section 2, the Huntingdon West Area Action Plan provides for a mixed use development incorporating 5,350 sq. m of net retail floorspace. A subsequent Development Management Committee resolved to approve a new Sainsbury's foodstore with some 5,275 sq. m net sales floorspace (9,456 sq. m gross), plus an additional nine retail units with some 700 sq. m net sales floorspace (1,094 sq. m gross) (1001750FUL). Approval is subject to the resolution of a S.106 agreement.
- 3.6 **Policy HU19** of the Stage 2 Consultation document provides for 5,350 sq. m of net retail floorspace in line with the approved Area Action Plan, but notes that implementation of the planning permission, for which there is a resolution to approve, would allow for slightly more retail floorspace than envisaged by the policy.

### **Alconbury Weald**

- 3.7 **Policy HU29** of the Stage 2 Consultation document provides for an area of land of approximately 575 hectares to the east of the A1(M) at the former Alconbury Airfield and Grange Farm, Huntingdon for a mix of uses, the scale of which is to be determined before finalising the Local Plan. It states that the development could be comprised of uses that would include:
- § between approximately 4,450 and 7,220 new dwellings;
  - § 150 hectares of employment land; and,
  - § local centres appropriate to the scale of development.

- 3.8 The text supporting the draft policy says:

*"It is expected that retail development will be kept to a minimum as the additional population growth here should look to Huntingdon town centre for retail services, in the same way as residents of Brampton and Godmanchester do."*

- 3.9 We understand the Council seeks to quantify the amount of retail development to be included in the draft allocation following consideration of this Retail Study.
- 3.10 As noted in Section 2, an application has been lodged (1201158OUT) for mixed use development comprising up to 7,000 sq. m gross of retail and service uses (Classes A1-A5), of which the largest store will be not more than 1,500 sq. m gross floorspace.

### **Godmanchester**

- 3.11 **Policy HU34** of the Stage 2 Consultation document provides for 42 hectares of land at Bearscroft Farm for development of a mix of uses to include:
- § Between 650 and 750 homes
  - § Between 5ha and 6ha of land for employment uses (all 'B' classes except B8)
  - § A small scale convenience retail facility of up to 600m<sup>2</sup> (net) of retail floorspace (class A1) to serve the local community

- 3.12 A Draft Urban Design Framework consulted on during 2012 also makes provision for a small food store. A planning application (1200685OUT) proposes 600 sq. m of retail floorspace.

### ***RAF Brampton***

- 3.13 **Policy HU30** of the Stage 2 Consultation document provides for approximately 49 hectares of land at RAF Brampton for mixed-use development to include approximately:

- § 400 homes
- § 3.2 hectares of employment land
- § 300 sq. m (net) retail floorspace

- 3.14 The RAF Brampton Urban Design Framework 2012 also provides for small local shops.

### ***St Neots Eastern Expansion***

- 3.15 **Policy SN1** of the Stage 2 Consultation document provides for 224 hectares of land east at Loves Farm and at Wintringham Park, Cambridge Road, St Neots for mixed use sustainable development to include:

- § Approximately 3,500 homes
- § Approximately 25ha of employment land (Class B1, B2 and B8)
- § A district centre of some 3 hectares containing offices (Class B1), approximately 1,600 sq. m of retail (Class A1-A5), including a supermarket with a maximum net retail size of 1,300 sq. m and other retail and ancillary uses
- § A local centre of some 0.3 hectares containing a maximum of 300 sq. m of retail floorspace (Class A1-A5)

- 3.16 The mix of uses is consistent with the provisions of the St Neots Eastern Expansion UDF 2010.

- 3.17 A planning application has been lodged within the area to the south of Cambridge Road (Wintringham Park) where the district and local centres are intended to be located. The application seeks a district centre of up to 8,500 sq. m gross floorspace retail and service uses (Classes A1-A5), of which the supermarket is to be not more than 2,500 sq. m net floorspace; and a local centre of up to 500 sq. m gross floorspace retail and service uses (Classes A1-A5).

### ***St Ives West***

- 3.18 **Policy SI1** of the Stage 2 Consultation document provides for 42 hectares of land for development of a mix of uses to be comprised of approximately:

- § Between 650 and 750 homes
- § Between 5ha and 6ha of land for employment uses (all 'B' classes except B8)
- § A small scale convenience retail facility of up to 600 sq. m (net) of retail floorspace (class A1) to serve the local community

- 3.19 This is consistent with the St Ives West UDF 2011 which provides for a local shop.

# 4 Town Centres Performance Analysis

4.1 The RTP Study 2010 and its predecessors along with other studies provide a comprehensive analysis of the performance of Huntingdon and St Neots Town Centres. We have not undertaken fresh health checks as part of this Study. However, we have reviewed some of the key health check indicators, based upon more up-to-date relevant information and any material changes in the health of the Huntingdon and St Neots since the RTP reports were undertaken. We also comment briefly upon the health of St Ives and Ramsey Town Centres. The key indicators and data sources we have taken account of in assessing the health of the District's Centres include:

- Visits to each of the centres in August 2012;
- Discussions with Officers;
- Previous centre health checks;
- amt-i Market Town Benchmarking Reports;
- Huntingdonshire Council footfall surveys;
- Diversity of uses and vacancy rates taken from GOAD Centres database; and,
- Retailer demand requirements from Focus and EGi.

4.2 Goad, Focus and EGi are national databases providing a wide range of information on retail and other commercial uses at town level. Prior to providing an assessment of each centre below, we set out the sub-regional retail context.

## Context

4.3 The four market towns of Huntingdon, St Neots, St Ives and Ramsey all have town centres of varying sizes. The market towns are part of a sub-regional hierarchy within which Cambridge, Peterborough and Bedford are the larger regional shopping and service centres. The influence of these larger centres on spending patterns in Huntingdonshire is evident from the household telephone interview survey findings considered in Section 5. The location of the centres in relation to the Huntingdonshire centres can be seen on the Overall Catchment Area Plan, Appendix 1.

- 4.4 The City Centre of Cambridge extends across the historic centre to the Grafton Centre and includes some 100,000 sq. m of retail floorspace (total occupied floorspace from GOAD). The Grand Arcade is the most recent addition to shopping provision in the historic part of the City and includes some 37,500 sq. m of floorspace with over 60 units largely dedicated to a high quality retail offer including a John Lewis department store.
- 4.5 Peterborough City Centre has a similar amount of retail floorspace as Cambridge. The largest shopping centre is the Queensgate Centre which opened in 1982 and comprises some 75,000 sq. m retail floorspace in over 90 shops. The centre is anchored by a John Lewis and Marks & Spencer and has recently added a large Primark store.
- 4.6 Bedford Town Centre accommodates some 60,000 sq. m retail floorspace. (total occupied floorspace from GOAD). Although historically a large centre, there has been little growth in recent times and the centre has slipped slightly in national rankings from 108<sup>th</sup> nationally as recorded in the Bedford 2005 Retail Study to 117<sup>th</sup> in the 2011 Venuescore rankings. The Bedford Town Centre Area Action Plan 2008 makes provision for more than 30,000 sq. m of new floorspace on the Town Centre West, Riverside Square and Castle Lane sites, and seeks further comparison retail.
- 4.7 In addition to the larger centres, Cambourne has a large Morrisons foodstore, a supermarket not currently represented within Huntingdonshire. Also the proposed new settlement of Northstowe will include provision for retail which may be attractive to residents on the eastern edge of Huntingdonshire.

## Huntingdon

- 4.8 The 2010 RTP Study confirmed the following in respect of Huntingdon Town Centre:

*“Huntingdon has experienced a slight recent slippage in the UK centre rankings, but we do not consider this to be a cause for particular concern. Similarly, although M&S Simply Food and Woolworths ceased trading since our last retail study, and the number of published operator requirements has declined, this echoes national trends. The vacancy rate has increased since 2007 but is only just above the UK average. Overall, therefore, we consider that the town centre is generally healthy, with no obvious signs of acute distress.*

*There are, however, some key qualitative deficiencies. In particular, the town centre’s fashion retail offer would benefit from improvement, and there remains below-average representation of food and drink outlets. As we advised in 2007, attracting prominent retailers and food & drink operators to Huntingdon will only realistically happen if premises of the right size, configuration and trading environment are provided.”*



- 4.9 The 2010 RTP Study found that Huntingdon was placed 343<sup>rd</sup> in the Management Horizons Retail Rankings in 2008, a fall of 7 places from 336<sup>th</sup> in 2004. The 2011 Venuescore Rankings (which has replaced Management Horizons and has a slightly different methodology) showed that in 2011 Huntingdon Town Centre was ranked 382<sup>nd</sup> nationally, a further fall from the 2004 and 2008 positions.
- 4.10 Although Huntingdon is the largest retail centre within the District, particularly for comparison goods shopping, figures derived from Table 7 of Appendix 4 show that the Town Centre only attracts 20% of the Overall Catchment Area's comparison goods expenditure, with the majority of this coming from residents of Huntingdon itself. Furthermore, despite its proximity to St Ives, Huntingdon Town Centre is only the third most popular comparison goods shopping destination for residents of St Ives (after St Ives itself and Cambridge); and for residents of St Neots it is the fourth choice comparison goods shopping destination (after St Neots, Bedford and Cambridge, with almost as much expenditure being attracted to Peterborough).
- 4.11 Table 4.1 below, derived from an Experian GOAD Category Report of a survey of the centre undertaken in April 2012, shows the diversity of uses and vacancy rates within Huntingdon Town Centre compared to national averages.

**Table 4.1: Huntingdon Town Centre Diversity of Uses**

Category	Outlets			Floorspace		
	Number of Outlets	Percentage of Total	National Average	Floorspace (sq. m)	Percentage of Total	National Average
<b>Comparison</b>	65	31.55%	32.93%	17,828	39.58%	36.35%
<b>Convenience</b>	11	5.34%	8.03%	7,581	16.86%	14.43%
<b>Retail Service</b>	30	14.56%	13.63%	2,722	6.04%	7.25%
<b>Leisure Services</b>	35	16.99%	21.96%	6,132	13.61%	22.76%
<b>Financial and Business Services</b>	30	14.56%	10.96%	4,785	10.62%	8.34%
<b>Vacant Outlets</b>	35	16.99%	12.16%	6,002	13.32%	10.16%

**Note: Survey date 24 April 2012**

- 4.12 The mix of uses within Huntingdon Town Centre is broadly in line with national averages, although with slightly higher vacancy rates. As the primary shopping centre within the District it might be expected to have a higher than average proportion of comparison goods units, which suggests a potential qualitative deficiency in this area, although the proportion of comparison goods floorspace is slightly higher than national averages.

4.13 The April 2009 Focus Town Report cited within the RTP Report 2010 showed that there were 19 retailer requirements for Huntingdon in 2009, down from a peak of 44 in 2007. The latest Focus retailer requirement figures for Huntingdon obtained in January 2013 show that there are 8 requirements.

**Table 4.2: Huntingdon Town Centre Retailer / Leisure / Service Requirements**

Huntingdon Town Centre Retailer / Leisure / Service Requirements		
Age UK	Cooltrader	Brighthouse
Matressman	Lloyds Pharmacy	Matalan
Bensons for Beds	Snap Fitness	

4.14 The EGi database indicates a wider range of operators having national requirements, including River Island, Gourmet Burger Kitchen, Love Coffee, Aldi, ASK, Zizzi, Poundland, Farmfoods, and B&M Bargains. It is questionable, however, whether these operators would actually consider locating in Huntingdon Town Centre. The low overall number of specific requirements in Huntingdon is indicative of the current weak state of the retail market.

4.15 Huntingdon Town Centre contains a reasonable convenience goods provision at present with the anchor stores of Sainsburys and Waitrose, and some smaller more specialist food retailers including Iceland, a Polish delicatessen, and Holland and Barrett. However, there is scope for improving this provision, potentially towards the lower end of the market. Traders such as Waitrose and Sainsburys are perceived as being at the upper end of the market. The convenience goods offer in Huntingdon and consumer choice for residents could therefore be improved through the provision of a 'discount' operator such as Aldi, Heron Foods, LIDL or Farmfoods.

4.16 In addition, it is clear that there is a shortage of higher end fashion retailers within Huntingdon, particularly as it is currently the primary shopping centre for residents of the District for comparison goods. Whilst the centre includes some national multiple fashion goods retailers, for example Next, New Look, Bon Marche, M&Co, Burton and Sports Direct; it is lacking in higher order retailers such as Topshop, Bhs, Marks and Spencer, River Island, Miss Selfridge, Dorothy Perkins, JD Sports, Gap and French Connection.

4.17 Attraction of higher order fashion clothing and footwear retailers through the redevelopment of the Chequers Court area should provide a major boost for the town centre by increasing its attractiveness to residents of the District significantly. Having regard to the structural changes in the retail sector discussed in the following chapter, Huntingdon is the only centre within the District that is likely to be able to achieve the critical mass to attract these types of retailers. In the absence of improving its offer in the fashion clothing and footwear sector, Huntingdon Town Centre may not be able to retain its current market share of expenditure attracted, let alone improve on the existing market share.

- 4.18 Whilst the centre has a reasonable leisure provision, it is lacking in terms of choice of restaurants and other facilities that are sought by many shoppers undertaking a comparison goods shopping trip. An improvement in the range and quality of restaurants and leisure facilities in the town centre would make it more attractive to shoppers and increase the amount of time people spend within the centre.

### ***Town Centre Footfall***

- 4.19 Huntingdonshire Council have monitored footfall levels within the four main town centres of the District since 2006. The footfall levels across Huntingdon Town Centre remained broadly stable in the period 2006 to 2011 with overall levels in 2011 marginally higher than in 2006. However, the latest figures for 2012 show a 6.9% decline from the 2011 figures, which means that the 2012 footfall figure for Huntingdon is now lower than that in 2006.
- 4.20 There has been substantial variation in footfall at individual locations, with the survey location outside Pizza Express showing a consistent increase and Waitrose also showing a marginal increase over 2006 levels. Areas that have shown a general decline over this period include 92 High Street, outside Natwest Bank, and 2 St Benedicts Court outside H Samuel.
- 4.21 The footfall data collected shows that the number of people visiting Huntingdon Town Centre appears to have remained fairly stable throughout the period 2006-2012. Although this is not an improvement, it needs to be considered in the context of the economic climate over the past 5 years, which has resulted in declines in footfall in a number of other centres. The Association of Town Centre Management's Springboard High Street Index shows an average decline in footfall over a similar period (2006-2012) of -23.6%. Hence, although there has been a slight decline in footfall in Huntingdon Town Centre, this is not a strong negative factor when considered in a national context.

### ***Vitality and Viability Conclusions***

- 4.22 Huntingdon Town Centre's health and vitality remains similar to that during the period when the RTP Study was undertaken. The decline in national Venuescore rankings may be attributable more to the improvements in the competing larger centres (which is part of a national pattern), rather than an absolute decline in Huntingdon. Huntingdon has a vacancy rate slightly higher than the national average, with a higher percentage of vacant outlets than vacant floorspace. This suggests that there is some need for larger units within the centre, as would be provided by the Chequers Court development.
- 4.23 We agree with RTP's conclusions in respect of qualitative deficiencies within the centre. There is a clear need for Huntingdon to improve its quality comparison goods offer to stem expenditure leakage from the District (as discussed in the following chapters), and to serve more successfully the District's projected growing population.

- 4.24 The Council has taken active steps to improve the comparison goods role of Huntingdon Town Centre through the proposals and planning consents granted for further comparison goods floorspace in the Chequers Court area. The relatively close larger competing centres of Cambridge and Peterborough present a strong and difficult challenge. The current difficulties being experienced by 'High Street' retailers illustrates further the problems of attracting new retail investment into smaller centres (see Section 6), and the important role that the Council has to play bringing forward initiatives to make the Town Centre more attractive to shoppers and investment.

## St Neots

- 4.25 The RTP Report 2010 confirmed the following in respect of St Neots Town Centre:

*"We have not identified any major causes for concern in relation to St Neots Town Centre. Although St Neots has slipped in the UK centre rankings, this reflects the trend experienced by other centres of a similar size. The town centre's convenience sector offer is healthy and the town centre's vacancy rate remains significantly below the UK average.*

*Although the number of published operator requirements has decreased recently, again this reflects a national trend, and some prominent names appear to have an interest in St Neots including Monsoon and Fat Face. If retailers of that calibre were to open in St Neots it would help to bolster the town centre's fashion retail offer, which is probably the centre's main qualitative deficiency. Overall, however, we consider that St Neots is generally performing well under current market/economic conditions."*

- 4.26 The 2010 Study found that St Neots was placed 511<sup>th</sup> in the Management Horizons Retail Rankings in 2008, a fall of 90 places from 421<sup>st</sup> in 2004. The 2011 Venuescore Rankings (which has replaced Management Horizons and has a slightly different methodology) showed that in 2011 St Neots Town Centre was ranked 527<sup>th</sup> nationally, a further fall from the 2004 and 2008 positions.
- 4.27 The comparison goods market share of expenditure for the town as a whole from its catchment area is over 50% (Table 8 of Appendix 4), which is reasonable considering the town's proximity to Cambridge and Bedford. The town as a whole has a strong retention rate for convenience goods with over 85% of expenditure retained within the town (Table 8 of Appendix 3).
- 4.28 Table 4.3 below, derived from an Experian GOAD Category Report from a survey of the centre undertaken in January 2012, sets out the diversity of uses and vacancy rates within St Neots Town Centre compared to national averages.

**Table 4.3: St Neots Town Centre Diversity of Uses**

Category	Outlets			Floorspace		
	Number of Outlets	Percentage of Total	National Average	Floorspace (sq. m)	Percentage of Total	National Average
<b>Comparison</b>	59	29.95%	32.93%	11,827	31.03%	36.35%
<b>Convenience</b>	17	8.63%	8.03%	7,079	18.57%	14.43%
<b>Retail Service</b>	38	19.29%	13.63%	4,562	11.97%	7.25%
<b>Leisure Services</b>	41	20.81%	21.96%	8,584	22.52%	22.76%
<b>Financial and Business Services</b>	22	11.17%	10.96%	3,010	7.90%	8.34%
<b>Vacant Outlets</b>	20	10.15%	12.16%	3,057	8.02%	10.16%

**Note: Survey date 30 January 2012**

- 4.29 Table 4.3 shows that, as with Huntingdon Town Centre, the mix of uses within St Neots is broadly in line with national averages, although with slightly lower vacancy rates. However, as St Neots is a smaller centre in floorspace terms than Huntingdon this is a broadly positive mix of uses.
- 4.30 St Neots has a fairly strong convenience goods offer with the centre anchored by Waitrose, Co-op and M&S Simply Food, with Iceland and Lidl also present (the latter on the edge of the centre). Comparison goods provision is generally more limited than in Huntingdon, which is to be expected for a slightly smaller centre. Leisure provision in St Neots is reasonable for a centre of its size and will improve shortly through the introduction of a new cinema.
- 4.31 The Town Centre is fairly compact being focussed on High Street. The convenience stores and parking areas are closely linked to the prime shopping frontages, so facilitating spin-off trade and maximising shopper convenience. The shopper environment is attractive, although vehicular traffic is intrusive.
- 4.32 The April 2009 Focus Town Report cited within the RTP Report 2010 showed that there were 12 retailer requirements for St Neots in 2009, down from a peak of 21 in 2005. The latest Focus retailer requirement figures for St Neots obtained in January 2013 show that there are 3 requirements only.

**Table 4.4: St Neots Town Centre Retailer / Leisure / Service Requirements**

St Neots Town Centre Retailer / Leisure / Service Requirements		
Cool Trader	Holland and Barrett	Snap Fitness

- 4.33 The EGi database indicates a wider range of operators having national requirements, including Gourmet Burger Kitchen, Love Coffee, Aldi, ASK, Zizzi, Poundland, Farmfoods, and B&M Bargains. It is questionable, however, whether these operators would actually consider locating in St Neots Town Centre. The low overall number of specific requirements in St Neots is indicative of the current weak state of the retail market.

### ***Town Centre Footfall***

- 4.34 The footfall levels within St Neots Town Centre show a consistent decline between 2006 and 2010 with a marginal rise in 2011 followed by a further 3.7% decline between 2011 and 2012. This has left the centre with a 2012 footfall of just over 80% of the level recorded in 2006. All locations have declined since the 2006 figure, and most locations have shown a consistent decline since 2006, excepting a slight rise in 2011.
- 4.35 The consistent decline in footfall over time is of concern in that it cannot be explained by a one-off event such as the opening of a competing facility that would cause a spike in the figures. The level of decline is also broadly in line with the -23.6% decline identified over the same period by the Association of Town Centre Management's Springboard High Street Index. In footfall terms however, St Neots has performed poorly compared to the District's other centres, despite the town's population having increased over this period.

### ***Vitality and Viability Conclusions***

- 4.36 We concur with RTP's conclusion in 2010 that St Neots is performing well generally and is on the whole a vital and viable town centre relative to the size of the town. The centre has a healthy convenience goods sector and a mix of uses that is broadly in line with national averages. The Town Centre has a reasonably attractive environment, although the penetration of traffic through the main shopping streets is an issue in the centre.
- 4.37 The vacancy rate is below national averages in terms of both floorspace and number of outlets, but the decline in footfall is a matter of some concern and suggests a need to improve the attractiveness of the town centre. This is something that may be achieved through town centre enhancement schemes.

## **St Ives**

- 4.38 The RTP Report 2010 does not include a detailed assessment of the vitality and viability of St Ives Town Centre. Venuescore in 2011 placed the centre 760<sup>th</sup> nationally, which is 233 places below St Neots and 417 places below Huntingdon. This broadly reflects the size of the town and its position in the District's retail hierarchy.
- 4.39 The town has a convenience goods retention rate from its catchment zone of around 60% (Table 8 of Appendix 3), and a retention rate of approximately 35% for comparison goods. (Table 8 of Appendix 4).
- 4.40 Table 4.5 below derived from an Experian GOAD Category Report from a survey of the centre undertaken in August 2011, indicates the diversity of uses and vacancy rates within St Ives Town Centre compared to national averages.

**Table 4.5: St Ives Town Centre Diversity of Uses**

Category	Outlets			Floorspace		
	Number of Outlets	Percentage of Total	National Average	Floorspace (sq. m)	Percentage of Total	National Average
<b>Comparison</b>	70	31.82%	32.93%	11,734	33.67%	36.35%
<b>Convenience</b>	11	5.00%	8.03%	3,809	10.93%	14.43%
<b>Retail Service</b>	40	18.18%	13.63%	3,595	10.32%	7.25%
<b>Leisure Services</b>	47	21.36%	21.96%	8,083	23.19%	22.76%
<b>Financial and Business Services</b>	29	13.18%	10.96%	5,165	14.82%	8.34%
<b>Vacant Outlets</b>	23	10.45%	12.16%	2,462	7.06%	10.16%

**Note: Survey date 17 August 2011**

- 4.41 Our visits to St Ives Town Centre showed that it has a good number and range of retailers for its size with representation of both independent retailers and national multiples. It is notable that the number of comparison stores is similar to Huntingdon and more than St Neots (although there is less overall comparison goods floorspace) and the number of service outlets exceeds both of those town centres. The historic environment of the centre and its riverside location are clearly also important attractions for shoppers using the centre.
- 4.42 As can be seen from Table 4.5, the Town Centre has a convenience goods provision in terms of units and floorspace slightly below national averages. The principal foodstores in the town centre are Waitrose and Budgens (with the Co-op store lying outside the town centre).
- 4.43 The latest Focus retailer requirement figures for St Ives obtained in January 2013 show that there are 9 requirements. These are outlined in Table 4.6 below.

**Table 4.6: St Ives Town Centre Retailer / Leisure / Service Requirements**

St Ives Town Centre Retailer / Leisure / Service Requirements		
Iceland	Phase Eight	Snap Fitness
Café Nero	Card Factory	Card Bar and Thorntons
Bonmarche	Bargain Book Time	Holland and Barrett

- 4.44 The list of requirements is strong for a centre of St Ives' size and indeed is higher than the two larger centres of Huntingdon and St Neots. However, some of these retailers already have stores within Huntingdon or St Neots. This suggests that there is market interest for improved retail provision in the town, and that St Ives is considered to have vitality and viability.
- 4.45 St Ives has a generally good provision of comparison goods retailers for a Town Centre of its size. The Town Centre also has a reasonable provision of restaurants and similar leisure uses, albeit with room for improvement within this sector, given the centre's riverside setting and attractive environment. This could increase the attraction of the town for visitors, as well as making the centre more attractive as a shopping destination for existing residents.
- 4.46 Vacancy rates are also below national averages, which is a positive indicator suggesting that there is reasonable demand from retailers to be represented within the centre.

### ***Town Centre Footfall***

- 4.47 Footfall levels in St Ives showed a strong improvement between 2006 and 2010, followed by a slight decline between 2010 and 2011, with a further rise between 2011 and 2012 of 2.5%. St Ives footfall levels are almost 20% higher in 2012 than in 2006. This is particularly positive given the decline in the national average figures over this period, as well as the decline or stagnation in other Huntingdonshire centres. It is also positive that shoppers do not appear to be deserting St Ives Town Centre following improved transport links to Cambridge with opening of the guided busway.
- 4.48 The large number (and proportion) of comparison and service outlets is likely to have contributed to the good footfall levels. It may also be that some specific factors, such as the popular market days have helped. However there is the possibility that people have simply walked through the town centre as a means of catching the bus to Cambridge and future footfall studies should assess this possibility.

### ***Vitality and Viability Conclusions***

- 4.49 We conclude that St Ives is currently a vital and viable town centre. It currently performs a lesser role within its local catchment than the larger Huntingdon or St Neots Town Centres, although it has a good range of comparison goods retailers for a centre of its size, an attractive historic centre, and a pleasant shopping environment.
- 4.50 Only one of the 'Top Five' foodstore retailers is present in the town (Waitrose), compared to three in Huntingdon and two in St Neots. Because Waitrose focusses on the higher end of the market, there may be some scope for increased consumer choice within the town in the convenience goods sector.



- 4.51 A particular challenge for St Ives is the proximity and accessibility of nearby larger centres such as Huntingdon and Cambridge. The new guided busway is a positive factor improving public transport accessibility in the District, although this also makes Cambridge City Centre with its superior shopping offer more accessible to residents of St Ives town in particular. We understand that the busway has exceeded initial projections in terms of usage. This is a factor that could challenge the performance of St Ives Town Centre over the longer term, if it results in a greater proportion of St Ives residents visiting Cambridge for shopping purposes.

## Ramsey

- 4.52 As with St Ives, the RTP Report 2010 does not include a detailed assessment of the vitality and viability of Ramsey Town Centre. There is also no Venuescore information for Ramsey, it being the smallest of the District's four main centres.
- 4.53 Table 4.7 below derived from an Experian GOAD Category Report from a survey of the centre undertaken in December 2011, shows the diversity of uses and vacancy rates within Ramsey Town Centre compared to national averages.

**Table 4.7: Ramsey Town Centre Diversity of Uses**

Category	Outlets			Floorspace		
	Number of Outlets	Percentage of Total	National Average	Floorspace (sq. m)	Percentage of Total	National Average
<b>Comparison</b>	31	32.63%	32.93%	4,589	34.33%	36.35%
<b>Convenience</b>	6	6.32%	8.03%	2,016	15.08%	14.43%
<b>Retail Service</b>	14	14.74%	13.63%	1,198	8.96%	7.25%
<b>Leisure Services</b>	18	18.95%	21.96%	2,378	17.79%	22.76%
<b>Financial and Business Services</b>	14	14.74%	10.96%	1,691	12.65%	8.34%
<b>Vacant Outlets</b>	11	11.58%	12.16%	1,449	10.84%	10.16%

**Note: Survey date 5 December 2011**

- 4.54 Table 4.7 shows that the provision of convenience and comparison goods facilities and services is close to the national average and that vacancy rates within Ramsey are also very close to the national average. The latter in particular is positive indicator for a centre of Ramsey's relatively small size. For a centre of its size, Ramsey has a reasonable provision of comparison goods retailers, restaurants and service facilities such as banks, serving the day to day shopping needs of its residents.

- 4.55 The Goad Category Report survey was undertaken almost exactly two years following the opening of the Tesco store (2,316 sq. net) a short distance to the north of the town centre. However, it is important to note that the Tesco store was opened after the 2009 Household Telephone Survey, and that there will therefore have been some material changes in shopping patterns in Ramsey since then.
- 4.56 Zone 8, within which Ramsey is located, previously retained just under 50% of its convenience goods expenditure (Table 8 of Appendix 3). This will have now certainly increased to above 50% and is likely to be in the region of 60%-70%, due to the town's location somewhat remote from competing opportunities.
- 4.57 The new store will have clawed back trade from Peterborough and Huntingdon. Table 4.7 above suggests that the impact upon Ramsey Town Centre itself has not been over-damaging in terms of the mix of retailers within the centre. The greatest trade diversions within the town are likely to have been from the close-by Co-Op store

### ***Town Centre Footfall***

- 4.58 Footfall levels in Ramsey Town Centre increased between 2006 and 2011 by almost 20%. However, within this overall growth trend there was a decline between 2009 and 2011 of around 10%, which is likely to have been caused by opening of the Tesco store within the town. More recently (between 2011 and 2012) footfall levels in Ramsey have declined by nearly 15%, so reversing the earlier growth trend.
- 4.59 Whilst an overall stability between 2006 and 2012 is not in itself negative, given the Association of Town Centre Managers Springboard index showing a decline of -23.6% over the same period, the recent sharp decline in footfall is clearly a negative factor which should be monitored.

### ***Vitality and Viability Conclusions***

- 4.60 Ramsey has a strong independent sector, which contributes significantly to its vitality and viability. However, due to the size of the centre and its proximity to Peterborough, the comparison goods offer of the centre is generally limited. Shops within the Town Centre are primarily focussed on Great Whyte and fairly spread out. Ramsey clearly serves a local catchment area, and in this context we consider that the Town Centre shows signs of reasonable vitality and viability.

# 5 Huntingdonshire Patterns of Retail Spending

5.1 For the purposes of establishing current patterns of retail spending RTP commissioned household telephone interview surveys from NEMS Market Research. 1,603 interviews were undertaken during October 2009. For the purposes of this report the NEMS survey findings have been adopted, but applied to updated population and expenditure base data. There have been some new shopping facilities implemented both within and outside the District since October 2009. These include:

- § Completion of a Tesco store in Ramsey with a net floorspace of 2,316 sq. m;
- § The introduction of B&Q to Huntingdon Retail Park; and,
- § Completion of a Morrisons store in Stanground Peterborough.

5.2 We consider that the Household Telephone Survey from October 2009 remains broadly representative of shopping patterns within the District. Where there may have been some local changes in shopping patterns arising from post 2009 changes, we comment accordingly in the report.

## Overall Catchment Area

5.3 The overall catchment area (OCA) and twelve zones adopted by RTP are shown in Spreadsheets 1 and 9 of the RTP Report 2010. The twelve zones are based on post-code sectors, which are identified in Table 5.1 below and replicated in Table 1 of Appendices 3 and 4. A map of the OCA showing how this relates to the Huntingdonshire District administrative area is included within Appendix 1.

**Table 5.1: Overall Catchment Area (OCA) Study Zones**

Zone	Constituent Postcode Sectors
<b>Zone 1</b> – Huntingdon Town	PE29 1, PE29 3, PE29 6, PE29 7
<b>Zone 2</b> – South East Huntingdon	PE28 9, PE 29 2
<b>Zone 3</b> – St Ives	PE27 3, PE27 4, PE27 5, PE27 6
<b>Zone 4</b> – North East Huntingdon	PE28 2, PE28 3
<b>Zone 5</b> – Ramsey	PE26 1, PE26 2
<b>Zone 6</b> – South Peterborough	PE7 3

Zone	Constituent Postcode Sectors
<b>Zone 7</b> – Sawtry	PE28 0, PE28 5
<b>Zone 8</b> – West Huntingdon	PE28 4
<b>Zone 9</b> – South Huntingdon	PE19 5, PE19 6
<b>Zone 10</b> – St Neots	PE19 1, PE19 2, PE19 7, PE19 8
<b>Zone 11</b> – North Bedford	MK44 2, MK44 3
<b>Zone 12</b> – North West Cambridge	CB24 3, CB24 4, CB24 5

## Convenience Goods Expenditure Patterns

- 5.4 The 2009 Household Telephone Survey shows that the retention rate for the OCA (including some areas outside the District in Bedford and north-west Cambridge) is around 73%. This is fairly positive given the proximity of strong nearby competing facilities in Bedford, Peterborough and at Cambridge. This retention rate is also likely to have increased slightly following the opening of the Tesco store in Ramsey as the 2009 survey showed that this zone previous had a less than 50% retention rate for convenience goods and that over 20% of the convenience goods expenditure within the zone leaked to locations outside the OCA. However, we note that there is also a new Morrisons at Stanground outside the OCA Boundary which may be attracting shoppers from Yaxley and Farcet.
- 5.5 Table 5.2 further below displays the most popular convenience goods shopping destinations for residents of the OCA. Destinations outside the OCA are indicated in bold. The combined monetary leakage from the OCA to the Tesco stores at Bar Hill and Serpentine Green, and Morrisons in Camborne amounts to £57m. Approximately £19m of this figure is derived from Zones 11 and 12 (Bedford and North-west Cambridge respectively), which lie mostly outside the District. This shows that whilst the retention rate of the District as a whole for convenience goods is broadly positive, there is some scope for 'clawback' of convenience goods trade leaking to locations beyond the OCA, particularly to the larger stores identified in Table 5.2 below.

**Table 5.2: Most popular Convenience Goods Shopping Destinations for Residents of OCA**

Facility	Market Share from OCA (%)
Tesco Extra, Sapley, Huntingdon	14.35%
Tesco Extra, St Neots	9.14%
Sainsburys, Huntingdon	8.45%
<b>Tesco Extra, Bar Hill</b>	<b>6.97%</b>
Waitrose, St Ives	6.41%

Facility	Market Share from OCA (%)
<b>Tesco Extra, Serpentine Green</b>	<b>4.45%</b>
<b>Morrisons, Cambourne</b>	<b>3.67%</b>
Waitrose, St Neots	3.12%
Other Stores, St Neots Town Centre	3.04%

### Comparison Goods Expenditure Patterns

- 5.6 The 2009 Household Telephone Survey shows that the retention rate for the OCA (including some areas outside the District in Bedford and north-west Cambridge) from comparison goods is just under 50%. This is to be expected given the lack of City or Sub-regional town centres within the District, and the location of Bedford, Peterborough and Cambridge centres a short distance to the south-west, north and south east of the OCA respectively. In our view the retention rate of the OCA as a whole is unlikely to have changed materially since the 2009 Household Telephone Survey was undertaken.
- 5.7 Table 5.3 below displays the most popular comparison goods shopping destinations for residents of the OCA. Those outside the OCA are indicated in bold. The combined comparison goods leakage to Peterborough, Cambridge and Bedford from the OCA amounts to £199m. This compares to the amount of money spent by residents of the OCA within Huntingdon, St Neots and St Ives Town Centres of £228m, i.e. the large centres outside the OCA are attracting almost as much comparison goods expenditure as is retained by the District's three main town centres.

**Table 5.3: Most popular Comparison Goods Shopping Destinations for Residents of OCA**

Centre / Facility	OCA Market Share (%)
Huntingdon Town Centre	20.44%
<b>Peterborough City Centre</b>	<b>15.67%</b>
<b>Cambridge City Centre</b>	<b>12.70%</b>
St Neots Town Centre	10.39%
St Ives Town Centre	7.22%
Stukeley Road Retail Park, Huntingdon	4.78%
<b>Bedford Town Centre</b>	<b>4.78%</b>

# 6 National Shopping Patterns and Trends

- 6.1 The shopping patterns that we have identified, and indeed the health of the District's existing main town centres, must be placed in the context of wider national trends. These national trends will affect the development of future local shopping patterns and will also influence the future health, vitality and viability of the District's centres.

## Convenience Goods Trends

- 6.2 Convenience goods trading plays an important role in maintaining the vitality and viability of smaller town centres, including the Huntingdonshire market towns. Within the convenience goods sector, the big four foodstore operators – Tesco, Sainsbury, Asda and Morrisons – are achieving an increasing share of the market. Table 17 of the Verdict report 'Food and Grocery Retailing in the UK 2012' shows that the 'Top Four' grocers increased their share of the total food and grocery market from 67.2% in 2008 to an estimated 69.8% in 2013. Including the Co-op and Waitrose, the market share of the 'Top Six' retailers of the total food and grocery market rose from 74.2% in 2008 to 78.8% in 2013.
- 6.3 In addition to attracting a high proportion of residents convenience goods expenditure, the majority of the turnover of the big four operators is in large foodstores. These stores continue to have large floorplates and large areas of adjacent surface level parking. Generally such stores are in out-of-centre and edge-of-centre locations where the necessary space is available, as opposed to town centre locations where such sites are more difficult to find.
- 6.4 Partly as a result of planning pressures, the big foodstore operators have introduced (in addition to their large stores) small format stores that can easily be accommodated within central locations, e.g. Tesco Metro and Sainsbury Local stores. This has helped to offset some of the pressures for decentralisation.
- 6.5 Discount foodstore formats have also grown in popularity, particularly in the current difficult economic climate. By virtue of their more limited size, such stores are more easily located within or close to centres. However, the operators generally insist on a standard layout/design format, which can be difficult to accommodate in some centres, particularly those with an historic environment.

## Growth of the Internet

- 6.6 One of the most pertinent retail trends in the UK at the moment is the increased importance of the internet as a means through which people conduct their shopping. For convenience goods, Experian has estimated that in 2006 only 2.8% of all expenditure was through non-store means (principally the internet), and that rose to 6.8% by 2012. Currently Experian estimates that non-store expenditure will rise to 15.7% by 2029. For comparison goods Experian estimate that in 2006 7.9% of all comparison goods expenditure was spent through non-store means and that this rose to 13.2% in 2012. By 2029 Experian forecasts that this will have risen to 21.4%. These percentages do not include shopping through the internet which actually goes through the retail store tills (such is currently the case for grocery shopping). Similarly, Verdict predicts that by 2026 £1 of every £7 (14.3%) spent in the UK will be online (convenience and comparison goods combined).
- 6.7 Physical stores cannot compete with the internet in respect of price due to lower overheads or in terms of the range of goods sold. For example, the Argos catalogue includes around 30,000 products, whereas Amazon sell in excess of 100,000,000 different products (directly and indirectly). It is therefore clear that smaller centres such as the four main centres within Huntingdonshire cannot compete with the internet in respect of these factors.
- 6.8 It is also important to consider the interrelationship between the internet and store requirements in terms of facilities and space. Shoppers no longer simply either purchase online or in store. Various options are now available to shoppers. They may purchase goods online but collect in store; purchase goods online that are sourced physically from stores and delivered to their home; research online before conducting a purchase within a store; research within a store before purchasing a product online; or use a smartphone or tablet device to research purchases or compare prices whilst in a store. This means that retail facilities need to be flexible to accommodate the increasing demands of modern shoppers for information, flexibility and convenience.

## Comparison Goods – Store Portfolio Consolidation and Closures

- 6.9 One consequence of the economic and technological changes afoot is that a number of retailers are seeking to consolidate their existing portfolios to a more limited number of larger flagship or showroom type stores within regional or sub-regional centres. Pressures on both disposable incomes and credit as a result of the recession, coupled with an ever increasing proportion of shopping being undertaken on-line, means that many retailers are not seeking to expand their physical store portfolios, or at least not to the degree they were prior to the recession.

- 6.10 Another important trend over the past few years has been a sharp increase in the number of retailers going into administration. Woolworths were the first high profile casualty, but have been followed by other major high street names, including Peacocks, TJ Hughes, Adams, Ethel Austin, Officers Club, Clinton Cards, Borders, Game, Jane Norman, Barratts, Republic, Jessops, HMV and Blockbuster. From the beginning of 2007 until the end of June 2012 208 retailers entered administration affecting over 20,000 stores and over 180,000 employees.
- 6.11 The increased proportion of retail expenditure being spent through the internet and the number of retail administrations has decreased the demand for existing and new retail floorspace. This has increased vacancy rates within centres and has meant that progressing the expansion and improvement of town centres is much more difficult.

### **Concentration of Retailing into Larger Centres**

- 6.12 The trend for retailers to concentrate their representation in larger centres reflects a strong rise in car ownership and mobility. In 1961 only 30% of (UK) households had a car and only 2% had more than one car. With limited public transport (as well as walking and cycling) the dominant mode of transport, shopping choices were limited and distances travelled were short. For the UK as a whole, about 77% of households now have one or more cars and a third of households have two or more cars, representing a huge increase in mobility over the last fifty years. In addition, public transport has improved in respect of easier movement to larger centres.
- 6.13 Compared to fifty years ago there is also now an increased proportion of income spent on discretionary and luxury items. The stronger emphasis on quality and fashion products coupled with increased mobility has favoured larger centres, such as Cambridge and Peterborough, as compared with smaller centres as in Huntingdonshire. The smaller centres and market towns have lost market share and have seen much less new development than the overall rate of expenditure growth could actually support. This situation is evident from the relatively low market shares of comparison goods expenditure attracted by the Huntingdon centres from the OCA, and is an important factor influencing the quantitative assessment of floorspace needs addressed in Section 7.
- 6.14 In addition increased competition from new retail facilities outside the OCA may make improvements to Huntingdonshire town centre comparison goods retention rates more difficult to achieve.



# 7 Quantitative Retail Assessment Findings

7.1 This section sets out the broad methodology used in assessing the quantitative capacity for convenience and comparison goods in Huntingdonshire up to 2031. The more detailed methodological approach for assessing capacity and the data assumptions used are set out within Appendix 2. The quantitative assessments are set out in detail in Appendix 3 for convenience goods and Appendix 4 for comparison goods. An assessment of the levels of retail expenditure capacity created in the emerging housing allocation areas in the District is contained within Appendix 5.

## Methodology

7.2 The methodology is consistent with the guidance contained within the Practice Guidance on Need, Impact and the Sequential Approach, and conforms with the requirements of the NPPF.

7.3 As noted in Section 5 we have adopted the catchment area and zones used in the RTP Report 2010; as well as the findings of the NEMS Household Telephone Interview Surveys undertaken in 2009 (commenting where appropriate on changes that have occurred since).

7.4 The most up-to-date population forecasts supplied by the Council have been used. The most recent information from Experian on local retail expenditure at the base data has been used, as well as recommended deductions for non-store forms of retailing (e.g. internet) and recommended growth rates based on national expenditure patterns.

7.5 The Study utilises the following eight step methodology:

- § Step 1 – Assess population increase over forecast period;
- § Step 2 – Assess residents' expenditure on convenience / comparison goods;
- § Step 3 – Calculate total available convenience / comparison goods expenditure;
- § Step 4 – Review residents' existing shopping patterns and flows of expenditure using Household Telephone Survey;
- § Step 5 – Calculate Overall Catchment Area and Individual Zone Market Shares;

- § Step 6 – Review the trading level of existing stores;
- § Step 7 – Calculate the turnover of Committed Developments and Policy Proposals; and,
- § Step 8 – Utilising the information from the above steps, calculate the capacity for additional floorspace.

## Changes since the RTP Report 2010

- 7.6 The methodology that we have used is similar to that used in Section 6 of the RTP Report 2010. For convenience goods, the RTP Report identifies capacity of up to 2,300 sq. m sales floorspace up to 2021 with a further 1,800 sq. m (4,100 sq. m in total) up to 2026. This is based on an increased retention rate from 74% to 80%, and taking account of potential 'over-trading' within existing foodstores in the District.
- 7.7 For comparison goods the RTP Report 2010 advises that there is capacity for up to 17,200 sq. m of sales floorspace in the period up to 2021 and a further 11,800 sq. m sales floorspace (29,000 sq. m in total) up to 2026. This is based on an increased retention rate for the District from around 50% to approaching 55%.
- 7.8 There are significant differences between our quantitative forecasts and those in the RTP report. The principal reason for the differences over the short term is the approval of a number of commitments since the publication of the RTP Study. These include the redevelopment of Chequers Court and the approval of the development of a replacement Sainsburys store and additional retail units on Brampton Road Huntingdon. In addition, reflecting the current economic recession (see below), more recent national retail forecasts show lower growth expenditure growth rates than utilised by RTP in 2010.
- 7.9 RTP assesses three capacity scenarios for convenience goods – existing retention rate, an increase in retention rate to 80%, and an increase in retention rate to 80% alongside an allowance for the overtrading of existing facilities. We only reproduce the first two of these scenarios as we have found that Huntingdonshire convenience shops are now trading broadly at company averages, as explained in Appendix 2 (Step 6). For comparison goods RTP assess two capacity scenarios – existing retention rate and an increased retention rate of 54.6%. We also assess two retention rate scenarios for comparison goods – existing retention rate and an increase in retention rate to 55%. The justification for these capacity scenarios is explained below.
- 7.10 The RTP Study 2010 provided forecasts for 2009, 2014, 2016, 2021 and 2026. This 2013 Study provides quantitative forecasts for test years of 2016, 2021, 2026, and 2031. Although the Local Plan covers the period 2011 to 2036, any economic forecasts over a lengthy period of time are subject to significant margins of error. This is because changes in economic conditions and the future structure of retailing cannot be accurately foreseen over lengthy periods of time. In accordance with normal practice the retail forecasts and policies relating to the latter part of the plan-period will therefore need to be monitored.

7.11 We have noted in the introduction to this report that, since the RTP Studies were published, the economic recession has persisted and major changes are continuing to occur in the retail sector. Both these factors are having significant effects on retailing in Huntingdonshire's town centres. They also create greater uncertainty for quantitative forecasts. We have adopted the latest information available on factors such as the growth of internet spending. Even so future potential for new shopping floorspace will be dependent on a number of factors for which the quantitative forecasts contain assumptions and about which there is considerable uncertainty at present.

## Capacity Findings – Convenience Goods

7.12 The convenience and comparison goods expenditure capacity findings are set below, but explained more fully in Appendix 2. As noted in Appendix 2 (Step 6), we have found that Huntingdonshire convenience shops overall are now trading broadly at company average turnovers. Our convenience (and comparison) goods capacity assessments therefore make no provision for latent expenditure capacity at the base date arising from any over-trading.

7.13 Table 7.1 below shows the convenience goods expenditure capacity within the OCA, based upon an increase in market share from approximately 73% at the base year to 80% by 2026.

**Table 7.1: Convenience Goods Expenditure Capacity – Increase in Market Share**

Convenience Goods	2013	2016	2021	2026	2031
Total Available Expenditure (£m)	£378.33m	£390.86m	£417.90m	£450.40m	£485.57m
Retention Rate (%)	74%	75%	78%	80%	80%
Retained Expenditure (£m)	£279.97m	£293.14m	£325.96m	£360.32m	£388.46m
Turnover of Convenience Goods Facilities from OCA (£m)	£276.44m	£277.27m	£279.22m	£282.02m	£284.85m
Turnover of Commitments from OCA (£m)	£71.81m	£72.02m	£72.53m	£73.26m	£73.99m
<b>Residual Capacity (£m)</b>	<b>-£68.28m</b>	<b>-£56.15m</b>	<b>-£25.79m</b>	<b>£5.04m</b>	<b>£29.61m</b>
Net Floorspace equivalent 'Top Five' foodstore (sq. m)	-	-	-	343	1,992
Net Floorspace equivalent 'Discounter' foodstore (sq. m)	-	-	-	773	4,494

7.14 The OCA convenience goods expenditure retention rate of 73% at the base year is derived from the Household Telephone Surveys. We have noted in Section 5 that implementation of a new Tesco foodstore in Ramsay is likely to have increased the market share of OCA retained expenditure to some degree and the market share of Ramsey itself (Zone 5) more significantly. Likewise new foodstore proposals in Huntingdon, as well as St Neots will increase the attractiveness of the foodstore offer within the OCA.

- 7.15 On the basis of this improved foodstore provision we believe that it is appropriate to plan for an increase in the OCA expenditure retention rate to 80% by 2026 (as shown in Table 7.1 above). We believe that it could be over-ambitious for the Council to plan for a greater increase than this because of the proximity of large parts of the OCA to competing convenience goods facilities at Bar Hill, Peterborough and Cambourne.
- 7.16 Table 7.1 includes an allowance for the turnover of convenience goods commitments of approximately £72m (this is a net gain figure, having allowed for the loss of turnover from the existing Sainsburys Huntingdon). We have taken into account five commitments since the undertaking of the previous Household Telephone Survey. These are:
- § Opening of a Tesco store to the north of Ramsey Town Centre (total 2,300 sq. m net convenience retail);
  - § Opening of a Co-op store on Cambridge Road in Godmanchester (total 230 sq. m net convenience retail);
  - § Proposed redevelopment of Chequers Court Huntingdon, (total 4,500 sq. m comparison and 2,000 sq. m of convenience);
  - § Proposed replacement of the existing Sainsburys store in Huntingdon with a new larger store (increase of around 4,000 sq. m gross) and adjacent retail units at Brampton Road, Huntingdon (total 4,600 sq. m comparison and 1,700 sq. m convenience); and
  - § Station Square at Loves Farm St Neots (total 171 sq. m net comparison and 437 sq. m of net convenience goods floorspace).
- 7.17 Table 7.1 shows that, having allowed for implementation of commitments and some increase in market share of expenditure attracted to the OCA centres, there is no additional floorspace capacity within the District until 2026. We comment on this finding in Section 8. In particular it should be noted that this does not necessarily mean that no additional retail floorspace should be granted planning permission until after 2026.
- 7.18 We have not included expenditure capacity figures for the post 2031 period, because over such a lengthy period of time quantitative forecasts are subject of considerable uncertainty and margins of error, and can therefore be misleading.

### Capacity Findings - Comparison Goods

- 7.19 Table 7.2 below shows the calculated comparison goods expenditure capacity within the OCA based upon maintenance of the existing comparison goods market share within the OCA.

**Table 7.2: Comparison Goods Expenditure Capacity – Constant Market Share**

Comparison Goods	2013	2016	2021	2026	2031
Total Available Expenditure (£m)	£600.19m	£652.56m	£760.43m	£910.49m	£1,091.26m
Retention Rate (%)	49.87%	49.87%	49.87%	49.87%	49.87%
Retained Expenditure (£m)	£299.33m	£306.78m	£325.45m	£454.09m	£544.24m
Turnover of Comparison Goods Facilities from OCA (£m)	£299.33m	£318.59m	£351.40m	£384.19m	£420.03m
Turnover of Commitments from OCA (£m)	£44.10m	£46.94m	£51.77m	£56.60m	£61.88m
<b>Residual Capacity (£m)</b>	<b>-£44.10m</b>	<b>-£40.08m</b>	<b>-£23.92m</b>	<b>£13.30m</b>	<b>£62.33m</b>
Net Floorspace equivalent (sq. m)	-	-	-	2,072	8,883

- 7.20 The OCA comparison goods expenditure retention rate of just below 50% at the base year is derived from the Household Telephone Surveys. We have retained this OCA market share of retained comparison goods expenditure at a constant level throughout the forecast period. Although significant new comparison goods floorspace is proposed in Huntingdon Town Centre, we have noted in Sections 4 and 5 the strong competition for OCA residents' comparison goods expenditure from the larger stronger competing centres at Cambridge, Peterborough, and Bedford. We have also referred in Section 6 to the economic challenges facing the 'High Street' and market towns. Because of these difficulties, it may well be challenging for the Huntingdonshire market towns to retain their existing market share of available comparison goods expenditure.
- 7.21 Table 7.2 includes an allowance for the turnover of comparison goods commitments of approximately £44m in 2013 (this is a net gain figure, having allowed for the loss of turnover from the existing Sainsbury Huntingdon). The commitments are the same as for convenience goods, being the comparison goods elements of the same developments.
- 7.22 Based on a constant market share of OCA expenditure being attracted to shops within the OCA over the forecast period (at around 50%), Table 7.2 shows that there is no substantive capacity for additional comparison goods floorspace within the District until 2026, which grows after that date to 8,883 sq. m net by 2031.

# 8 Retail Needs and Opportunities

- 8.1 In this section we draw together our findings in respect of the analyses in earlier sections of the report and appendices, and provide our views on matters included within our instructions, covering:
- § The current performance and opportunities within the Huntingdonshire town centres;
  - § Quantitative convenience and comparison goods expenditure and floorspace potential within Huntingdonshire District;
  - § The principal market challenges facing the town centres; and
  - § Advice on Development Plan allocations and proposals.

## The Current Performance and Potential within the Town Centres

- 8.2 Overall the health and vitality of Huntingdonshire's town centres is broadly good, but not exceptional. All four of the main centres have performed relatively well through the past couple of years during what has been a very challenging time for the high street. The only one of the four main centres within the District to have vacancy rates above the national average is Huntingdon.
- 8.3 Each of the four centres performs a slightly different role and function:
- § Huntingdon is the main centre within the District particularly for comparison goods;
  - § St Neots performs a strong convenience goods and small scale comparison goods role;
  - § St Ives has a strong character with its attractive historic and riverside environment; and,
  - § Ramsey contains a strong local independent retail offer alongside useful service functions such as banks, salons, estate agents and pubs / cafes / restaurants.
- 8.4 In qualitative terms, whilst each of the centres is performing reasonably well there is potential room for improvement, particularly within the comparison goods sector as a result of the low comparison goods retention rate of the District. Huntingdon Town Centre would be best placed to provide for any possible future improvement due to its central position within the District, good accessibility, concentration of existing comparison goods facilities and clear opportunity for such expansion through the approved Chequers Court proposals.

- 8.5 As discussed in the previous section, there is some scope for improving market share within the District for both convenience and comparison goods. However, achieving these potential increases will be challenging, because of the quality of existing provision in nearby centres outside the District, improvements in accessibility to these centres, and market demand realities.
- 8.6 For example, recent and forthcoming transport improvements in the District such as the opening of the Cambridgeshire guided bus-way, the upgraded A421 and potential future improvements to the A14 are positive factors in that they increase the accessibility of Huntingdonshire's Town Centres. However, these accessibility improvements also present a challenge to retailing within the District as they make higher order centres, in this case Cambridge, Peterborough and Bedford, more accessible to residents of the District. Whilst these improvements are unlikely to have fundamentally changed shopping patterns in the District, they may make future potential increases in retention rates within Huntingdonshire more difficult to achieve.

## Expenditure and Floorspace Capacity within the OCA

- 8.7 Our overall expenditure capacity findings for the OCA are summarised in Table 8.1 below.

**Table 8.1: Retail Expenditure/Floorspace Capacity Findings**

	2013	2016	2021	2026	2031
<b>Convenience Goods</b>					
Residual Expend Capacity (£m)	<b>-£68.28m</b>	<b>-£56.15m</b>	<b>-£25.79m</b>	<b>£5.04m</b>	<b>£29.61m</b>
Floorspace equivalent 'Top 5 Foodstores' ( sq. m net)	-	-	-	343	1,992
Floorspace equivalent 'Discounter' Foodstore (sq. m net)	-	-	-	773	4,494
<b>Comparison Goods</b>					
Residual Expend Capacity (£m)	<b>-£44.10m</b>	<b>-£40.08m</b>	<b>-£23.92m</b>	<b>£13.30m</b>	<b>£62.33m</b>
Floorspace equivalent (sq. m net)	-	-	-	2,072	8,883

### **Convenience Goods**

- 8.8 Table 7.1 (Section 7) shows that having allowed for implementation of commitments and some increase in above market share of expenditure attracted to the OCA centres, there is no additional floorspace capacity within the District until 2026. By 2031 the floorspace capacity rises to 1,992 – 4,494 sq. m net, depending on the nature of the new floorspace provided (Top 5 retailers or discounter store).

- 8.9 The quantitative expenditure forecasts do not include the turnover requirement of over 4,000 sq. m of net convenience goods floorspace included within current 'policy proposals'. We have estimated a turnover requirement for these proposals of approximately £20.5m at 2013 (taken from Table 11 of Appendix 3). The turnover of the policy proposals have not been taken into account in the capacity findings presented in Table 8.1 above.
- 8.10 The expenditure capacity findings do not mean that no additional floorspace should be granted planning permission until after 2026. The justification and timing of these policy proposals will be determined in large part by the implementation and phasing of the new housing proposals, which they are intended to serve, e.g. at St Neots, Brampton and Wyton.
- 8.11 There may also be instances of localised qualitative convenience goods need (see below 'Additional Proposals'), for example to widen consumer choice or reduce potential over-trading. We have noted in Appendix 2 that there are current proposals for a Lidl store in Huntingdon. There are currently no 'discounter' food stores in Huntingdon. We do not comment on the current application in terms of location and other planning issues.

### ***Comparison Goods***

- 8.12 Table 7.2 (Section 7) shows that on the basis of the OCA being able to retain the current level of comparison goods expenditure within the OCA centres (approximately 50%), an expenditure surplus after commitments is not achieved until 2026, which by 2031 gives rise to a net floorspace requirement of 8,883 sq. m.
- 8.13 We have indicated above that the projections towards the end of the forecast period (post 2021) should be treated with caution. Furthermore, achievement of the economic potential indicated by the comparison goods forecasts will be strongly dependent upon being able to attract new retail investment into the Huntingdonshire town centres, as is being sought in particular through the Chequers Court development in Huntingdon Town Centre. Progress with the Chequers Court development and its effects on Huntingdon Town Centre will be an important indicator of future potential.
- 8.14 The capacity analysis does indicate, however, that there may be scope for provision of additional comparison goods floorspace over and above existing commitments, in the longer term and following the implementation of the Chequers Court proposals. This additional capacity should in the first instance be directed towards reducing vacancies in existing centres and following this, towards Huntingdon Town Centre as the principal comparison goods shopping destination within the District.
- 8.15 Any additional comparison goods floorspace that has the potential to reduce leakage from the OCA would be a positive factor, although this would need to be considered very carefully in the context of the existing retail hierarchy and the potential impact on the vitality and viability of existing centres. Furthermore, it is unlikely that incorporation of this scale of additional comparison goods floorspace into the District's Town Centres could be achieved without threatening the vitality and viability of the existing shopping areas of the town centres.



## Principal Market Challenges facing the Town Centres

- 8.16 The biggest challenge for Huntingdonshire's town centres over the short to medium term will be to maintain their market share of available comparison goods expenditure in the face of competition from larger retail centres such as Cambridge and Peterborough. The increased dominance of the internet as a means through which people purchase non-food goods in particular may mean that the internet becomes a more popular source of purchasing goods for residents of Huntingdonshire than some of the District's town centres. We have noted in Section 6 that by 2021 Experian predicts that nationally the proportion of comparison goods purchased on the internet will rise to 21%.
- 8.17 Providing an offer that is attractive to residents of the District will also be difficult because of the current trend for comparison goods retailers to seek to concentrate in higher order centres with an existing critical mass of similar operators and high levels of footfall.
- 8.18 There is still however reasonably strong market demand from large retailers within the convenience goods sector for new stores and increasing levels of floorspace as evidenced by the recent Sainsburys and LIDL applications in Huntingdon.

## Development Plan Allocations and Policy Proposals

- 8.19 We comment below on the 'policy allocations' within each of the District's Special Policy Areas (SPAs) and Strategic Expansion Locations.

## Methodology

- 8.20 For each policy proposal evaluated, we have taken the current 2036 housing target figures provided by Huntingdonshire District Council, and average household size figures derived from East of England data to arrive at a target population at 2036 for each policy proposal.
- 8.21 We have then assessed the amount of convenience and comparison goods expenditure that would be generated by the population, at the same time considering the proportion of new residents' convenience and comparison expenditure that should appropriately be provided for locally. This is a matter of judgement and varies according to the scale and type of retail facilities that are considered to be appropriate, particularly in the context of the planning strategy for the area.
- 8.22 We have made no allowance for any expenditure inflows from residents living outside the new housing areas. This is of potential relevance only in the case of the larger new housing areas providing larger scale shopping facilities. Depending upon the particular circumstances and proposals, there could be justification for some floorspace in addition to the quantum that we have identified.

- 8.23 Convenience and comparison goods expenditure is translated to floorspace equivalents on the basis of the likely sales densities that would be achieved by retailers in these locations. These again vary according to the size of the settlements served and scale and type of new retail facilities provided, i.e. retail facilities in smaller settlements would be likely to have lower sales densities. Details of the assessment are included within Appendix 5.
- 8.24 The floorspace figures should be treated as broad brush. They are based on a number of assumptions, in particular the sales densities that might be achieved by operators. In considering the overall floorspace of any centres, allowance would also need to be made for non-retail floorspace taken up by commercial services such as hair and beauty salons, hot food take-aways etc., as well community and health facilities.

## **Huntingdon SPA**

### ***Huntingdon Town Centre and Huntingdon West***

- 8.25 The main commitments and policy proposals within Huntingdon are associated with the relocation of the existing Sainsbury's store from the Town Centre and associated Chequers Court redevelopment proposals.
- 8.26 The commitment for Chequers Court amounts to around 8,000 sq. m of net comparison goods floorspace and 2,300 sq. m of convenience goods floorspace (excluding the loss of the existing Sainsburys store). The commitment for Huntingdon West is for a Sainsburys foodstore of 9,456 sq. m with a net sales area of 5,275 sq. m and 1,094 sq. m of additional floorspace within smaller retail units following a resolution to approve the planning application in January 2013. The level of approved floorspace is in excess of 5,350 sq. m as included in the Local Plan Stage 2 consultation (taken from the Area Action Plan). We consider that it would be appropriate to reflect the resolution to approve in the Stage 3 consultation, rather than extant Area Action Plan total.
- 8.27 Following implementation there will be limited scope only for further convenience goods provision in the town, as the market share is already high at around 90%. There will be little scope to increase this further, particularly if a new discount foodstore operator is introduced to the town, as would arise from the LIDL planning application proposals (1200633OUT), were these to be approved and implemented.

### ***Bearcroft Farm Godmanchester***

- 8.28 The Stage 2 Local Plan draft allocation provides for 600 sq. m net of retail floorspace, as we understand is currently proposed in a planning application.
- 8.29 A store of this size would be appropriate to serve primarily the day-to-day (principally top-up) shopping needs of residents within the 750 houses proposed in this location and the nearby surrounding area. Table 2 of Appendix 5 shows that the level of convenience goods floorspace capacity created by the 750 new homes would be 303 sq. m gross in addition to capacity for 418 sq. m gross comparison goods floorspace.

### ***RAF Brampton***

- 8.30 The 2012 RAF Brampton Urban Design Framework and emerging Local Plan include the promotion of small local shops to serve the new residential population of this area. In our opinion this is justifiable in that it would promote sustainable shopping patterns and reduce the need for residents to travel for day-to-day shopping items. However the level of retail provision should not be of a scale to compete substantively with the existing retail provision within Huntingdon Town Centre, which should be promoted as the principal comparison goods shopping destination for residents of Brampton.
- 8.31 Based on an assumption that 50% of convenience goods expenditure and 20% of comparison goods expenditure is retained within the new settlement area, Table 3 of Appendix 5 shows that there would be capacity of up to 156 sq. m gross convenience goods floorspace and up to 257 sq. m gross comparison goods floorspace created through the 400 houses proposed at Brampton. However, depending upon the likely trading format and turnover potential of the operator, the floorspace potential could be higher than this.
- 8.32 The provision of additional retail floorspace at Brampton should not detract from the position of promoting Huntingdon Town Centre as the first choice main food shopping and first choice comparison goods shopping destination for the new residents of Brampton.

### ***Land South of Ermine Street***

- 8.33 The Stage 2 Local Plan draft allocation provides for 1,050 new homes in this location in addition to an additional 400 homes on land to the north of Ermine Street.
- 8.34 An extension to Huntingdon in this location of 1,050 homes or more would be sufficient to warrant some additional small scale retail provision. Based on an assumption that 50% of convenience goods expenditure and 20% of comparison goods expenditure is retained within this area, Table 4 of Appendix 5 show that the level of convenience goods floorspace capacity created by the 1,050 new homes would be 410 sq. m gross in addition to capacity for 517 sq. m of gross comparison goods floorspace.
- 8.35 There may be some justification for the provision of convenience goods floorspace slightly higher than the capacity identified due to other nearby housing commitments. However, comparison goods floorspace in this location should be limited, due to the proximity of Huntingdon Town Centre which should be promoted as the principal comparison goods shopping destination for new residents in this area.

### ***Huntingdon SPA Summary***

- 8.36 Table 8.2 below summarises the floorspace capacity (rounded figures) in the Huntingdon SPA arising from both existing committed floorspace and our recommendations on appropriate floorspace levels for other allocations. The latter are based upon levels of housing growth anticipated in the Huntingdon SPA during the plan period.

8.37 Of the 21,664 sq. m of total gross retail floorspace recommended within the Huntingdon SPA, 90% (19,589 sq. m) is already committed through the Chequers Court and Huntingdon West permissions / resolutions. It should also be noted that the Huntingdon Town Centre floorspace figures are net additional having allowed for the loss of the Sainsburys store.

**Table 8.2: Summary of Retail Floorspace Commitments and Policy Recommendations – Huntingdon SPA**

Location	Commitments / Floorspace Recommendations		
	Convenience Goods sq m gross	Comparison Goods sq m gross	Total sq m gross
Huntingdon Town Centre	133	8,906	9,039 (gross additional)
Huntingdon West	6,563	3,987	10,550
Bearcroft Farm Godmanchester	300	400	700
RAF Brampton	175	200	375
Land South of Ermine Street	450	550	1,000
<b>Huntingdon SPA Total</b>	<b>7,621</b>	<b>14,043</b>	<b>21,664</b>

## St Neots SPA

### *St Neots*

8.38 The population of St Neots is expected to grow substantially over the Local Plan period. It is evident that this expanding population will require an increase in local services including retail facilities to meet the day to day needs of the new residents. This is particularly the case with the St Neots Eastern Expansion Area, which is located approximately 1km from the town centre.

8.39 This need is reflected in the support for a new District Centre and Local Centre in the St Neots Eastern Expansion Design Framework December 2010.

### *Expansion Location*

8.40 The Local Plan Stage 2 consultation identifies a proposal for retail in the Eastern Expansion area as follows: 1,600 sq. m of retail (A1-A5) including a supermarket with a maximum net retail size of 1,300 sq. m within a district centre; and 300 sq. m of retail (A1-A5) within a local centre. Since then an application for development at Wintringham Park (land to the south of Cambridge Road) has been lodged suggesting that the District Centre have up to 8,500 sq. m of A1-A5 and the Local Centre up to 500 sq. m of A1-A5.

- 8.41 The promotion of retail facilities in this location to serve the growing population is in our opinion justifiable, provided that the level of floorspace proposed would not detract from the main role and function of St Neots Town Centre as the primary convenience goods and comparison goods shopping destination for residents of the town. The out-of-centre Tesco store at Barford Road already competes with the town centre for this function. We have also noted in Section 4 the continued decline in footfall within the town centre between 2006 and 2012.
- 8.42 Table 5 in Appendix 5 provides our assessment in respect of the St Neots East Expansion Area. Based on an assumption that 50% of convenience goods expenditure and 20% of comparison goods expenditure is retained within the new settlement area, Table 5 indicates that there is capacity for 1,118 sq. m gross of convenience goods floorspace and 1,660 sq. m of comparison goods floorspace to serve the future level of housing growth identified for the St Neots East expansion area. This is based upon the creation of £9.09m of additional convenience goods expenditure and £8.63m of additional comparison goods expenditure through the new housing development to the south and north of Cambridge Road and the Loves Farm reserved site (but excluding the already developed housing to the north of Cambridge Road).
- 8.43 There is a committed retail development as part of Station Square at Loves Farm that we have estimated could result in a convenience goods turnover of £4.95m and a comparison goods turnover of £1.28m by 2036. These turnover estimates are based on a floorspace of 782 sq m gross. For the purposes of our assessment we have assumed that the turnover generated by the commitment at Station Square is broadly equivalent to the latent retail capacity created by the already constructed housing to the north of Cambridge Road. Table 8.3 therefore includes floorspace figures for the Loves Farm commitment and the additional capacity created by the new housing proposed in the area assessed above.
- 8.44 There could be justification for a larger quantum of floorspace than we have identified, depending upon a variety of considerations including the likely trading format and turnover potential of the operator. On this basis we recommend an allocation allowing for a modern supermarket and some other shops in the Eastern Expansion area. The Council may wish to consider including careful policy wording to ensure that the impact of retail development in this location is rigorously tested in the context of the need to maintain the vitality and viability of the town centre.

- 8.45 We have some concerns in respect of the retail hierarchical definitions used in the current policy wording in the St Neots Eastern Expansion Urban Design Framework. Based on the level of housing growth proposed in the St Neots Eastern Expansion Area and the broad scale and type of new retail facilities under consideration, we believe that the proposed centres would be more appropriately defined as a Local Centre and Neighbourhood Centre respectively (rather than as District Centre and Local Centre as currently worded). District Centres are generally of a larger scale and usually contain at least one large supermarket or superstore, whereas local centres usually contain a range of small shops of a local nature including a small supermarket. It is our view that a Local Centre and Neighbourhood Centre definition would be more commensurate with the scale of the proposed Eastern Expansion Area. .
  
- 8.46 There is no substantive capacity for additional convenience or comparison goods floorspace within St Neots over and above existing policy proposals. As such, we do not think that there is any need to make specific allocations for new retail development within the town, other than where this is of a modest scale and may be appropriate in the context of the overall regeneration of the town centre.
  
- 8.47 There is some qualitative justification for the provision of further comparison goods floorspace within the Town Centre to stem leakage to Bedford and Cambridge, and as the population of the town grows over the longer term. However, the provision of any additional comparison goods floorspace within the town should contribute positively to the vitality and viability of the existing Town Centre, and must not be of a scale that would result in the undermining of the position of Huntingdon Town Centre as the principal comparison goods shopping destination within the District.
  
- 8.48 Table 8.3 below summarises the floorspace capacity (rounded figures) in the St Neots SPA arising from our recommendations on appropriate retail floorspace levels for the Eastern Expansion Area.

**Table 8.3: Summary of Retail Floorspace Commitments and Policy Recommendations – St Neots SPA**

Location	Commitments and Floorspace Recommendations		
	Convenience Goods sq m gross	Comparison Goods sq m gross	Total sq m gross
St Neots Eastern Expansion	1,250	1,600	2,800
Station Square at Loves Farm	555	227	782
<b>St Neots SPA Total</b>	<b>1,805</b>	<b>1,827</b>	<b>3,532</b>

## St Ives SPA

### *St Ives*

- 8.49 The existing St Ives centre has strong vitality and viability, despite the accessibility of other larger centres (Huntingdon and Cambridge) to residents of the town. On this basis there is no overriding quantitative and qualitative need for additional convenience or comparison goods floorspace within the town over the short and medium term in addition to the small local shop provided for by the St Ives West Urban Design Framework 2012.
- 8.50 Given the provision of only Waitrose and Budgens stores within the town centre and a relatively small Co-Op outside it, foodstore competition within the town is somewhat limited. The town also has a fairly low retention rate compared to, for example, St Neots.

### *St Ives West*

- 8.51 The St Ives West Urban Design Framework 2012 and the Local Plan Stage 2 consultation provide for a local shop within the growth area which is to support 500 dwellings. The proposal in the draft allocation for a shop of up to 400 sq. m is reasonable in this regard, given that Table 6 of Appendix 5 demonstrates that there is capacity for 438 sq. m gross of retail floorspace created by the planned housing development in this location (188 sq. m convenience, 250 sq. m comparison).

### *St Ives SPA Summary*

- 8.52 Table 8.4 below summarises the floorspace capacity (rounded figures) in the St Ives SPA arising from our recommendations on appropriate retail floorspace levels for the St Ives SPA.

**Table 8.4: Summary of Retail Floorspace Policy Recommendations – St Ives SPA**

Location	Floorspace Recommendations		
	Convenience Goods sq m gross	Comparison Goods sq m gross	Total sq m gross
St Ives West	200	250	450
<b>St Ives SPA Total</b>	<b>200</b>	<b>250</b>	<b>450</b>

## Ramsey SPA

- 8.53 Ramsey town centre principally serves the market town of Ramsey/Bury and receives little inflow from outside of its immediate catchment. The provision of a new Tesco foodstore on the edge of the town will have increased both the convenience and comparison goods retention rates of the town. Notwithstanding this, the centre has retained a reasonable independent offer. As a result we believe that there is no substantive quantitative need for additional retail floorspace within Ramsey over the plan period. Notwithstanding this, the priority for the town should be the facilitation and protection of its existing offer and the independent retail provision in particular.

## Strategic Expansion Locations

- 8.54 We have referred above to the St Neots Eastern Expansion Location under the St Neots SPA heading. The other two Strategic expansion Locations are Alconbury Weald and Wyton-on-the-Hill.

### *Alconbury Weald*

- 8.55 Support for new housing and associated retail development is provided within the Local Plan Stage 2 Consultation. We understand that the amount of new housing proposed in the Stage 3 Consultation will be 5,000 new dwellings (similar to that contained within a current planning application).
- 8.56 As Alconbury is the largest of the District's proposed housing growth areas and also includes the provision of a substantial amount of employment growth, there is a clear need for some new retail floorspace to serve the new residents and workers of this area.
- 8.57 Table 11 of Appendix 5 shows the levels of retail floorspace capacity that would be created by the housing growth at Alconbury. Two scenarios are presented for convenience goods, one on the basis that around 50% of expenditure of new residents should be retained within the new settlement, and one that 75% should be retained. The actual retention rates achieved would be strongly influenced by the size of foodstore provided.
- 8.58 A small foodstore and other complementary convenience provision might be expected to achieve a retention rate of around 50%, whereas a larger store and other complementary convenience provision could be expected to achieve a retention rate of approaching 75%. The retention rate for comparison goods is assumed to be 20%, to allow for the purchase of day to day comparison goods only in Alconbury Weald by local residents, consistent with the strategy to promote Huntingdon Town Centre as a principal destination for comparison goods shopping.



- 8.59 The level of convenience goods floorspace capacity created through housing growth at Alconbury Weald varies between 1,364 sq. m and 2,046 sq. m gross. The level of comparison goods floorspace capacity is 2,126 sq. m gross. Because of the larger size of Alconbury compared to other growth areas, it is likely that new retail floorspace in this location would achieve turnover levels more commensurate with national averages. In addition some allowance should be at Alconbury for new retail potential generated by workers in the expansion area and, partly associated with this, some expenditure inflow.
- 8.60 In addition to any overall upper floorspace limit, consideration could be given to additional control measures such as the maximum floorspace size of a foodstore, and other qualitative requirements in respect of the role and type of trading of new shopping facilities at Alconbury. In addition the phasing of new retail development might be tied to the delivery of specified levels of employment and housing provision.

### ***Wyton-on-the-Hill***

- 8.61 The Stage 2 consultation for the Local Plan proposed between 870 and 1,765 new homes at Wyton. We understand that the proposal for the Stage 3 consultation will be for 3,750 houses in this location.
- 8.62 Based on an assumption that 50% of convenience goods expenditure and 20% of comparison goods expenditure is retained within the new settlement area, this would result in the creation of capacity for up to 1,177 sq. m gross of convenience goods floorspace and 1,892 sq. m gross of comparison goods floorspace. Depending upon the likely trading format and turnover potential of the operator, the floorspace potential could be higher than this. However, Wyton-on-the-Hill is close to both Huntingdon and St Ives, and Huntingdon Town Centre should be promoted as the first choice comparison goods shopping destination for residents of Wyton to support its role as the main retail centre within the District.
- 8.63 Table 8.5 below summarises the floorspace capacity (rounded figures) in Alconbury Weald and Wyton-on-Hill arising from our recommendations on appropriate retail floorspace levels for these Strategic Expansion Locations.

**Table 8.5: Summary of Retail Floorspace Policy Recommendations – Alconbury Weald and Wyton-on-Hill Strategic Expansion Locations**

Location	Floorspace Recommendations		
	Convenience Goods sq m gross	Comparison Goods sq m gross	Total sq m gross
Alconbury Weald	2,250	2,250	4,500
Wyton-on-the-Hill	1,250	1,750	3,000

## Additional Proposals

- 8.64 Having regard to the limited quantitative expenditure capacity for new convenience and comparison floorspace in the District and our appraisal of the current performance of the four town centres, we do not believe that it would be appropriate to make further development plan allocations, or to provide explicit planning policy support for new convenience or comparison goods floorspace in addition to the commitments and policy proposals already identified within the Local Plan Stage 2 Strategy and Policy Consultation document.
- 8.65 The Local Plan covers the period 2011 to 2036. We have explained in Section 7 why our overall quantitative capacity assessments for convenience and comparison goods provide quantitative floorspace forecasts until 2031 only. Quantitative forecasts covering a period some 20 years in the future would be subject of considerable uncertainty. We do not believe that it would be appropriate to make site allocations now, the quantitative justification for which may only emerge in the post 2031 period.
- 8.66 The emerging Local Plan currently requires an impact assessment to support any retail proposals of over 600 sq. m net floorspace. We support the identification of a locally based threshold aimed at sustaining and protecting the health and vitality of the District's Centres. Consideration might also be given to a requirement for impact assessments where the floorspace of retail proposals is materially in excess of the floorspace specified in development plan policy allocations (more than 50% larger, for example).
- 8.67 A further manner in which the Council can help support its town centres in the face of structural changes in the retail sector is through its response to out-of-centre development proposals, and by ensuring that such proposals do not impact adversely upon the vitality and viability of centres, and on the potential to attract future investment to them. This could include out-of-centre proposals for town centre uses other than retail, such as leisure, restaurants or hotels.
- 8.68 Any proposals for additional comparison goods floorspace within the District that would undermine Huntingdon Town Centre's role should be resisted. In the face of current national trends for retailers to concentrate in larger centres and for shoppers increasingly to use the internet, any schemes that would draw shoppers and footfall from Huntingdon would make it even more difficult for the centre to attract new comparison goods retailers and perhaps to retain existing national multiples.

# 9 Summary Conclusions

- 9.1 There is no substantive quantitative or qualitative need for additional retail development within the District in addition to existing commitments and policy proposals over the short to medium term (until at least 2021).
- 9.2 However, there are some instances of localised qualitative needs such as for an improvement in consumer choice in the convenience goods sector in St Ives and to serve the growing communities within the District.
- 9.3 Huntingdon Town Centre should be protected and promoted as the main comparison goods shopping destination within the District with a strong supporting convenience sector. St Neots, St Ives and Ramsey should remain the principal centres for convenience and day-to-day comparison goods shopping for their local populations and immediate catchments.
- 9.4 The Chequers Court development within Huntingdon Town Centre will be an important part of substantiating Huntingdon's role as the main comparison goods shopping destination within the District. This will hopefully be achieved through attracting more high order fashion goods retailers, which will reduce the need for shoppers to travel to Peterborough, Cambridge and Bedford. Notwithstanding the clearly positive effects that this development would have once realised, it is evident that securing the desired type of retailers will be a particular challenge during the current difficulties within the retail market.
- 9.5 The provision of new retail facilities to serve new housing developments and in the expansion areas of existing settlements is to be encouraged. However these facilities should not compete in scale and offer with the existing four main town centres within the District.
- 9.6 The significant new housing and employment development proposed at Alconbury will require some retail provision to serve the day to day needs of the residents and workers within this area. New retail development in this location should not detract from Huntingdon Town Centre's position as the main comparison goods shopping destination within the District. Specific retail proposals should be judged against the role and function that they would perform, and whether they are consistent with the overall retail strategy, particularly in relation to the role of Huntingdon Town Centre within the retail hierarchy.

- 9.7 Current trends in the retail sector (in particular growth of the internet and the consolidation of the store portfolios of many retailers) indicate that it will be difficult for market towns to maintain their role and function. The Huntingdonshire Town Centres face competition from the larger centres of Peterborough, Cambridge and Bedford. Consideration needs to be given to the actions that can be taken to combat these trends.

**Deloitte LLP**

**May 2013**

### **Important notice**

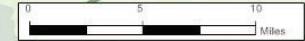
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# Huntingdonshire Retail Study 2013

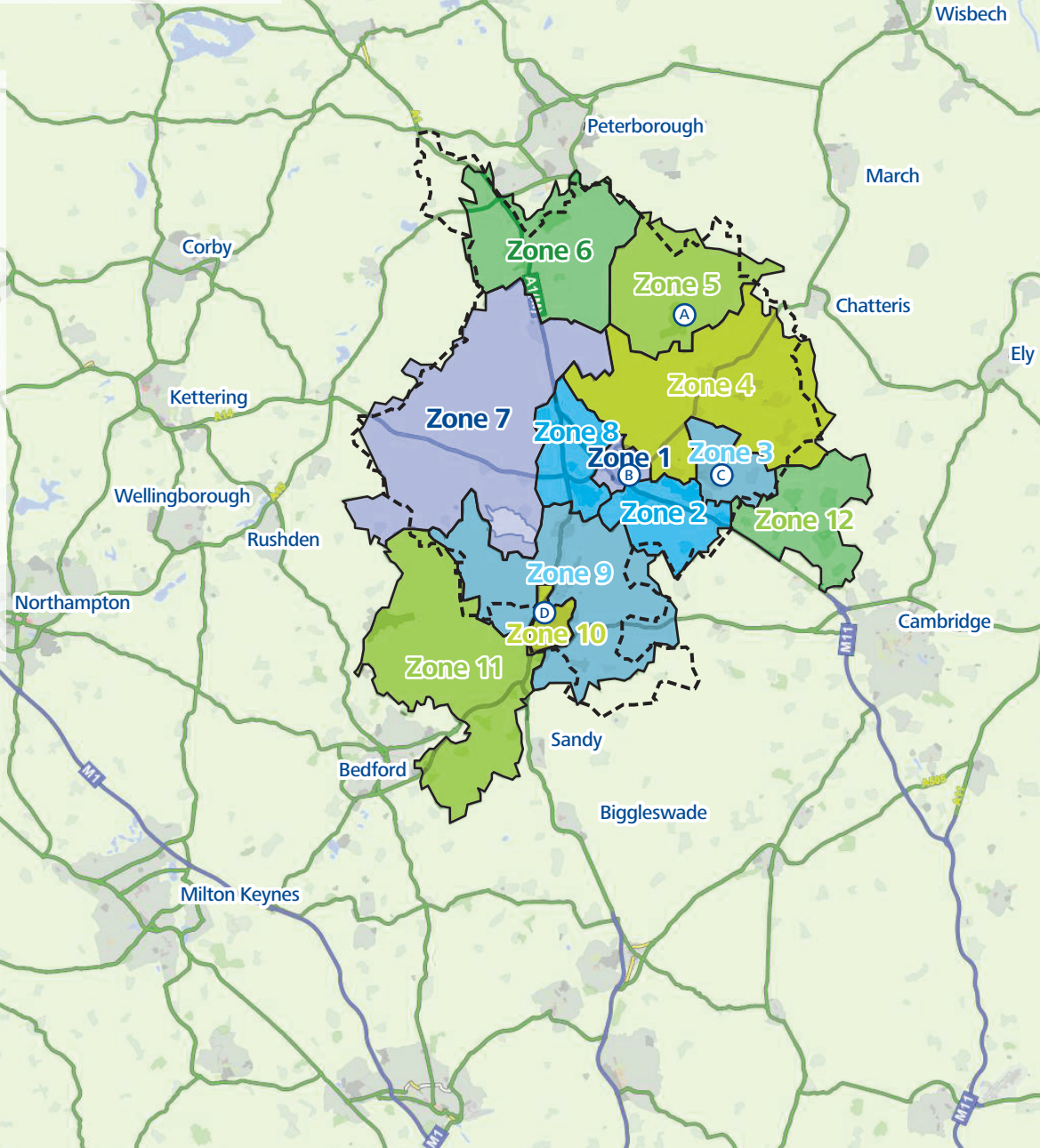
## – Overall Catchment Plan



- Zone 1 – Huntingdon Town Centre
- Zone 2 – South East Huntingdon
- Zone 3 – St Ives
- Zone 4 – North East Huntingdon
- Zone 5 – Ramsey
- Zone 6 – South Peterborough
- Zone 7 – Sawtry
- Zone 8 – West Huntingdon
- Zone 9 – South Huntingdon
- Zone 10 – St Neots
- Zone 11 – North Bedford
- Zone 12 – North West Cambridge

- (A) Ramsey Town Centre
- (B) Huntingdon Town Centre
- (C) St Ives Town Centre
- (D) St Neots Town Centre

----- District Boundary





# Appendix 2

## Quantitative Retail Assessment

### Methodology and Findings

#### Methodology

1. The methodology is consistent with the guidance contained within the Practice Guidance on Need, Impact and the Sequential Approach and conforms with the requirements of the National Planning Policy Framework.
2. As noted in Section 5 of the main report we have adopted the catchment area and zones used in the RTP Report 2010; as well as the findings of the NEMS Household Telephone Interview Surveys undertaken in 2009 (commenting where appropriate on changes that have occurred since).
3. The most up-to-date population forecasts supplied by the Council have been used, as well as the most recent information from Experian on local retail expenditure at the base data, and recommended deductions for non-store forms of retailing (e.g. internet) and growth rates based on national expenditure patterns.
4. The Study utilises the following eight step methodology:
  - § Step 1 – Assess population increase over forecast period;
  - § Step 2 – Assess residents' expenditure on convenience / comparison goods;
  - § Step 3 – Calculate total available convenience / comparison goods expenditure;
  - § Step 4 – Review residents' existing shopping patterns and flows of expenditure using Household Telephone Survey;
  - § Step 5 – Calculate Overall Catchment Area and Individual Zone Market Shares;
  - § Step 6 – Review the trading level of existing stores;
  - § Step 7 – Calculate the turnover of Committed Developments and Policy Proposals; and,
  - § Step 8 – Utilising the information from the above steps, calculate the capacity for additional floorspace.

## Catchment Population

### Step 1 – OCA Population Forecasts

5. The updated population forecasts for the OCA are slightly higher than those within the RTP Report 2010. This is due to use of updated Council growth data based upon the East of England Forecasts.
6. Table 2 of Appendices 3 and 4 shows the population for the OCA and twelve constituent zones. The base population data was obtained from Experian Micromarketer in November 2012 and projected to the end of the study period using the Council's population forecasts for zones 1-10 and the ONS 2012 2010-based sub-national population projections for zones 11 and 12<sup>1</sup>. Table A2.1 below shows the population of the OCA for each of the relevant test years.

**Table A2.1: OCA Population Projections**

	2013	2016	2021	2026	2031
<b>OCA Projections</b>	<b>195,772</b>	<b>201,191</b>	<b>210,068</b>	<b>218,786</b>	<b>227,303</b>

7. The population of the OCA is just over 10% higher than that for the District in 2013. This is principally due to the inclusion of areas to the south-west and south-east of the District, including areas within Bedford and South Cambridgeshire.

## Convenience Goods

### Step 2 – Residents' Expenditure on Convenience Goods

8. Tables 3 and 4 of Appendix 3 set out the expenditure per head of residents within the twelve OCA zones. Table 3 shows the total expenditure of residents on convenience goods each year, and Table 4 expenditure in shops, having discounted Non-Store Retail Trade (NSRT). NSRT is principally expenditure through the internet, but also through markets, catalogues, vending machines and door to door sales. In the case of Huntingdonshire District this would also include any expenditure in farm shops. This percentage deduction for each year is taken from Experian's latest Retail Planning Briefing Note 10.1 published in September 2012<sup>2</sup>.

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<sup>1</sup> Zones 1-10 lie predominantly within Huntingdonshire District, whereas Zones 11 and 12 lie predominantly within Bedford Borough and South Cambridgeshire District respectively.

<sup>2</sup> In line with guidance from Experian, the deduction does not include goods ordered online, but collected or delivered from physical stores and therefore transacted through the tills of stores. It does, however, include operations such as Ocado, or 'dark' stores and warehouses where access to the public is not available. Experian estimates that 70% of all Non Store Retail Trade goods are groceries purchased online, but delivered from 'physical' foodstores.

9. The base year 2011 figure was obtained from Experian Micromarketer in November 2012 and projected using Experian 'Forecast' growth rates. 'Forecast' growth rates have been adopted, as these represent a prediction of how retail expenditure is estimated to grow, rather than being based on past trends. Trend-based growth rates have been more appropriately used in the past when there was greater confidence in past trends continuing. The difficulties inherent with forecasts based on past trends were illustrated in the range of different forecasts produced in 2009. We consider that trends prior to the recession are unlikely to be replicated in the future, due to the current economic uncertainty and the lack of available credit (that fuelled recoveries in consumer spending in the past).

### ***Step 3 – Total Available Convenience Expenditure***

10. Following steps one and two above, Table 5 of Appendix 3 sets out the total amount of expenditure available in each of the twelve study zones and the OCA as a whole. This is achieved by multiplying the population of each of the zones (from Table 1) by residents' expenditure per head excluding NSRT. Table 5 shows that in 2013 there is £378.33m of convenience goods expenditure available within the OCA, rising to £390.86m by 2016, and £417.70m by 2021.

### ***Step 4 – Residents' Convenience Goods Shopping Patterns***

11. Tables 6 and 7 of Appendix 3 indicate where residents of the OCA currently undertake their convenience goods shopping trips. This information is based upon the household telephone interview surveys conducted by NEMS Market Research in October 2009.
12. Table 6 shows the market share of a particular facility from residents of each zone. For example it shows that the most popular convenience goods shopping destination for residents of Zone 1 (Huntingdon Town Centre) is the Tesco Extra, Abbots Ripton Road, Sapley; the most popular destination for residents of Zone 3 (St Ives) is the Waitrose, Station Road, St Ives; and for Zone 10 (St Neots) is the Tesco Extra on Barford Road.
13. Table 7 converts the individual zone market shares contained within Table 6 into flows of convenience goods expenditure to give the turnover of retail facilities within the OCA from residents of the OCA. The table also shows the amount of money leaking to retail facilities outside the OCA. This 'leakage' is flowing principally to 'Buffer' areas that lie a short distance from the District such as Peterborough, Bedford and Cambridge. The Buffer Zones utilised have the same boundaries as those adopted in the RTP Study 2010 and enable the number of shoppers resident within Huntingdonshire District, but shopping in adjacent Local Authority areas, to be identified.
14. Table 7 shows for example that the total convenience goods turnover of facilities within the OCA from residents who live within the OCA is £276.44m in 2013. When compared to the total available OCA residents' expenditure in 2013 of £378.33m, this shows that a significant proportion of the overall convenience goods expenditure is retained within the OCA, with less than 27% 'leaking' to facilities outside the OCA. Taking the zones that lie principally within Huntingdonshire District (Zones 1-10), the retention rate increases to around 80% (derived from figures within Table 7).



## Step 5 – OCA and Zone Convenience Goods Market Shares

15. Table 8 of Appendix 3 sets out the individual retention rate of each of the OCA zones. These figures are summarised in Table A2.2 below along with each zone’s market share from the OCA overall, shown within the right-hand column of Table A2.2 and Table 8 of Appendix 3. The table shows for example that Huntingdon Town shops (excluding the Tesco Extra at Sapley) attracts approaching half of the available convenience goods expenditure from Huntingdon Town and 15% of the convenience goods expenditure from the OCA as a whole.

**Table A2.2: Market Shares of Convenience Goods Shops within OCA Zones**

Zone Convenience Shops	Market Share of Zone Convenience Goods Expenditure %	Market Share of OCA Convenience Goods Expenditure %
<b>Zone 1</b> – Huntingdon Town	48.35% <sup>3</sup>	15.04% <sup>4</sup>
<b>Zone 2</b> – South East Huntingdon	9.59%	0.88%
<b>Zone 3</b> – St Ives	61.34%	10.85%
<b>Zone 4</b> – North East Huntingdon	36.86%	15.22%
<b>Zone 5</b> – Ramsey	47.80%	3.37%
<b>Zone 6</b> – South Peterborough	22.91%	1.98%
<b>Zone 7</b> – Sawtry	11.96%	0.97%
<b>Zone 8</b> – West Huntingdon	8.47%	0.62%
<b>Zone 9</b> – South Huntingdon	8.22%	0.76%
<b>Zone 10</b> – St Neots	86.73%	21.54%
<b>Zone 11</b> – North Bedford	6.57%	0.46%
<b>Zone 12</b> – North West Cambridge	17.48%	1.39%
<b>Total OCA</b>	-	<b>73.07%</b>

<sup>3</sup> The market share would rise to around 90% if the Tesco store at Sapley were to be included (it is actually within Zone 4). Figures taken from Tables 5 and 7 of Appendix 3 - £19.82m spent by residents of Zone 1 at facilities within Zone 1 + £17.09m spent at Tesco Extra Sapley by residents of Zone 1 = £36.91m. £36.91m / £41.00m total available expenditure = 90.02%.

<sup>4</sup> This figure would rise to 29.39% were the Tesco Extra store in Sapley to be included.

16. Table A2.2 shows that shops within the OCA retain approximately 73% of OCA residents' expenditure, and that the majority of this is accounted for by facilities within Zones 1 and 10 (Huntingdon Town and St Neots). Table A2.2 also shows that whilst some of the smaller centres contain facilities that are locally popular for convenience goods shopping, it is the facilities within the larger towns of Huntingdon and St Neots that draw shoppers from across the District.
17. The urban area of Huntingdon town is split between OCA Zones, with the Tesco Store at Abbots Ripton Road Sapley falling within Zone 4 (North East Huntingdon). Were this store were to be included within Huntingdon itself (Zone 1), the retention rate of Huntingdon town would increase to 90%, which is very high for a town of Huntingdon's size with several nearby competing facilities.

### ***Step 6 – Trading Level of Existing Stores***

18. Information on the trading levels of existing stores is provided in Tables 7, 9a and 9b in Appendix 3. Table 7 sets out the survey derived turnover of all existing stores within the OCA derived from the findings of the Household Telephone survey. Table 9a provides the benchmark turnover of named foodstores. Table 9b provides aggregate turnover figures for the other non-named foodstores within Huntingdon, St Neots and St Ives Town Centres, based on the findings of the Household Telephone Survey (Table 7).
19. Table 9a shows that the benchmark convenience goods turnover of existing foodstores within the OCA is £227.08m in 2013 (excluding the Tesco store in Ramsey). Table 7 indicates that across the OCA other non-named shops (including those in Huntingdon, St Neots, St Ives and Ramsey town centres) add another £45.16m turnover (in the absence of any other information we have treated their survey derived turnover from Table 7 as a 'benchmark'). The total combined 'benchmark' turnover therefore equates to £272.24m which is only marginally lower (just over 1%) than the survey-derived turnover of all facilities within the catchment area of £276.44m (Table 7).
20. It must be recognised however that the Household Telephone Survey is not a 'perfect' tool for assessing the turnover of smaller convenience stores, and it is probable that the turnover of some of these stores has been over-estimated by the Survey. This is indicated by the findings of Table 9b for the three town centres of Huntingdon, St Neots and St Ives. The table shows a turnover per sq. m of 'other' floorspace (smaller stores not specifically named within the Household Telephone Survey) in excess of £5,000 per sq. m for each of the centres. Based on our on the ground inspections of the town centres, we doubt that levels this high are actually being achieved.
21. In our opinion it is to be expected that foodstores and other shops in rural areas will not achieve the same levels of turnover as their counterparts in the larger towns and more densely populated areas. This does not mean that they are unviable (some of their costs such as rental levels will be lower).
22. Overall, based on the Household Survey findings and our inspection of the principal centres and foodstores within the OCA, we believe that existing facilities taken as a whole are trading at a level that is broadly in accordance with a benchmark norm and that overall there is no material 'over-trading' or 'under trading' at the base year that should form part of our economic assessment.

23. On an individual basis there are a number of stores across the District that are shown to be over or under-trading by notable amounts. Table A2.3 below identifies facilities within the District that were found to be trading over or under-trading by £2m or more by the Household Telephone Survey.

**Table A2.3: Convenience Goods Over and Under-Trading in 2013**

Facility	Benchmark Turnover 2013 (£m)	Quantum of Over / Under-Trading (£m)	Quantum of Over / Under-Trading (%)
<b>Waitrose, Princes Street, Huntingdon</b>	£12.93m	£-2.25m	-17.4%
<b>Tesco Express, Stukely Meadows, Huntingdon</b>	£2.02m	£6.61m	+327.3%
<b>Waitrose, Station Road, St Ives</b>	£15.08m	£9.16m	+60.77%
<b>Tesco Extra, Abbots Ripton Road, Huntingdon</b>	£43.66m	£10.63m	+24.3%
<b>Co-op, Newtown Road, Ramsey</b>	£11.07m	£-2.15m	-19.4%
<b>Co-op, Bentley Avenue, Yaxley</b>	£7.81m	£-3.05m	-39.0%
<b>Tesco, Barford Road, St Neots</b>	£30.34m	£4.22m	+13.9%
<b>Tesco Express, Old Great North Road, Eaton Socon</b>	£3.47m	£3.08m	+89.0%

24. As can be seen, there is notable variation in the trading performance of facilities across the District. It is likely however that since the opening of the Tesco store in Ramsey that the over-trading within the Tesco Extra store in Huntingdon has been reduced. The new Tesco in Ramsey is also likely to have increased the under-trading at the Co-op store in Ramsey even further.

25. The substantial over-trading at some of the smaller stores such as the Tesco Express in Stukeley Meadows and Eaton Socon is likely to be overstated to a degree, due to the imperfect nature of household surveys discussed above. Some of the under-trading at other small stores, such as the Co-op in Yaxley, is likely to be for the same reason. The one larger foodstore that shows a substantial degree of over-trading is the Waitrose store in St Ives. This may suggest a justification for further convenience goods provision in St Ives.

## **Step 7 – Retail Commitments and Policy Proposals**

26. Table 10a of Appendix 3 sets out the turnover of convenience goods commitments. We have taken into account four convenience goods commitments in the capacity assessment that are either extant or are stores that have opened since the undertaking of the previous Household Telephone Survey. These are:
- § Opening of a Tesco store to the north of Ramsey Town Centre (total 2,300 sq. m net convenience retail);
  - § Opening of a Co-op store on Cambridge Road in Godmanchester (total 230 sq. m net convenience retail);
  - § Proposed redevelopment of Chequers Court Huntingdon, (total 4,500 sq. m comparison and 2,000 sq. m of convenience): ,
  - § Proposed replacement of the existing Sainsburys store in Huntingdon with a new larger store (increase of around 4,000 sq. m gross) and adjacent retail units at Brampton Road, Huntingdon (total 4,600 sq. m comparison and 1,700 sq. m convenience); and
  - § Station Square at Loves Farm St Neots (total 171 sq. m net comparison and 437 sq. m of net convenience goods floorspace).
27. These commitments generate a calculated net additional turnover in 2013 of £71.81m. This takes account of a loss of turnover that will result from closure of the existing Sainsburys store within Huntingdon Town Centre.
28. Table 10b of Appendix 3 provides estimates of the convenience goods turnover that would arise from 'policy proposals' in the District. These are proposals that have a degree of specific policy support – such as through an urban design framework for an identified quantum of retail floorspace. There are seven relevant convenience goods 'policy proposals' within Table 10b. These are:
- § A new District Centre proposed within the St Neots East Urban Design Framework and the Local Plan Stage 2 Strategy and Policy Consultation;
  - § A new Local Centre proposed within the St Neots East Urban Design Framework and the Local Plan Stage 2 Strategy and Policy Consultation;
  - § A retail unit proposed within the St Ives West Urban Design Framework and the Local Plan Stage 2 Strategy and Policy Consultation;
  - § A foodstore and additional retail units proposed within the RAF Brampton Urban Design Framework; and
  - § A new retail unit proposed as part of the Bearscroft Farm proposals (covered by Planning Application 1200685OUT).
29. These policy proposals have an estimated net additional (following any demolitions) convenience goods turnover in 2013 of £20.50m. We examine these policy proposals in the final capacity scenario of the convenience goods quantitative assessment.
30. We have not made any turnover allowance for new retail development associated with the housing and employment led redevelopment of Alconbury Airfield within our overall capacity assessment. However, we assess the level of retail floorspace that could be supported directly by the housing growth at Alconbury within Appendix 5, and make recommendations on this within Section 8 of the report.
31. Our attention has been drawn in addition to two current retail proposals before the Council. These are:

- § A proposed LIDL store in Huntingdon (Planning Application 1200633OUT); and,
- § The proposed retail floorspace included within the Alconbury Weald development proposals (Planning Application 1201158OUT) and referred to in the Local Plan Stage 2 Strategy and Policy Consultation.

These proposals are not addressed specifically in this study.

### **Step 8 –Capacity for Additional Convenience Goods Floorspace**

32. Tables 11 and 12 of Appendix 3 utilise the information from the previous Tables to assess the levels of residual expenditure capacity within the OCA over the Study period. This follows the same six-step approach as in the equivalent tables in the RTP 2010 Study (Spreadsheets 15a, 15b and 15c), namely:
- § **A:** Calculate the total available convenience goods expenditure within the OCA to support retail floorspace (taken from Tables 5)
  - § **B:** Calculate the current OCA retention rate (taken from Table 8, and increased where appropriate).
  - § **C:** Calculate the current level of retained expenditure (**A x B**).
  - § **D:** Take away the turnover of existing facilities from the OCA (taken from Table 7);
  - § **G:** Take away the turnover of Commitments from the OCA (taken from Table 10);
  - § **H:** Calculate the surplus expenditure potentially available to support additional convenience goods floorspace (**C – D – G**).
33. Residual expenditure capacity is converted to floorspace equivalent figures on two bases. The first is based on the likely floorspace requirements of the 'Top Five' foodstore operators (Tesco, ASDA, Sainsburys, Morrisons and Waitrose). The second is based on the requirements of 'Discounter' operators (Aldi, LIDL, Iceland and Farmfoods).
34. Table 11 sets out the capacity position on the assumption that the market share of the OCA remains constant from 2009 at around 73%. This shows no convenience goods expenditure capacity within the OCA by 2031.
35. Table 12 makes allowance for an increase in market share across the OCA to 80% by 2026 (consistent with the approach modelled in the RTP Report 2010). This shows no convenience expenditure goods capacity within the OCA following implementation of commitments until 2026. We comment on this scenario in Sections 7 and 8 of the report setting out our capacity findings.
36. We have not included expenditure capacity figures for the post 2031 period, because over such a lengthy period of time quantitative forecasts are subject of considerable uncertainty and margins of error, and can therefore be misleading.

37. The expenditure capacity tables display the calculated turnover of existing policy proposals within the District. These figures are not deducted from the overall level of capacity identified or the floorspace equivalent figures. These are included for indicative purposes however as the levels of specific retail floorspace included in the capacity assessment have a degree of existing policy support through, for example, an adopted Urban Design Framework.

## Comparison Goods

38. The same broad methodology is employed within the comparison goods capacity assessment as is employed within the convenience goods capacity assessment set out above. Therefore to avoid unnecessary repetition, the description of the comparison goods methodology below only covers matters where there are material differences in the methodology.

### **Steps 1, 2 & 3 – Available Comparison Goods Expenditure**

39. The population data contained within Appendix 4 is identical to that utilised within Appendix 3. Tables 3 and 4 of Appendix 4 also set out residents' comparison goods expenditure per head for each of the OCA zones. Table 3 indicates the total expenditure per head figure and Table 4 the expenditure figure minus the deduction for NSRT. The expenditure per head in Table 3 has been projected utilising Experian 'Forecast' comparison goods growth rates, and the relevant NRST deduction percentages have also been taken from Experian Retail Planner Briefing Note 10.1 (September 2012).

### **Step 4 – Residents' Comparison Goods Shopping Patterns**

40. Tables 6 and 7 of Appendix 4 indicate where residents within the OCA currently buy various categories of non-food goods. These tables set out the market shares and flows of expenditure for comparison goods overall. This is based upon questions asked in the 2009 Household Telephone Surveys as to where residents of the OCA shopped for the following goods categories:

- § Clothing and footwear;
- § Furniture, Carpets and Soft Household Furnishings;
- § DIY and Decorating Goods;
- § Domestic appliances;
- § Health Beauty and Chemist items;
- § Recreational Goods; and,
- § Other Goods (including books, CDs, jewellery, glass and china).

41. Table 7 shows the total flows of comparison goods expenditure for each OCA Zone and for the OCA as a whole. It also shows the amount of expenditure leaking to retail facilities outside the OCA (including to identified 'Buffer' areas). The table shows that the total comparison goods turnover of facilities within the OCA from residents of the OCA is £299.33m. When compared to the total OCA residents' available expenditure of £600.19m in 2013, this shows that around half (49.87%) of the overall comparison goods expenditure within the OCA is attracted to facilities within the OCA.

### **Step 5 – OCA and Zone Comparison Goods Market Shares**

42. Table 8 of Appendix 4 presents the market share of comparison goods expenditure retained within each of the zones from its home zone. This is calculated by dividing the total amount of money spent by residents of a particular zone within their home zone (derived from Table 7) by the total available comparison goods expenditure within that zone (derived from Table 5). The individual market shares of each zone and their market share from the OCA as a whole taken from Table 7 are summarised in Table A2.5 below.

**Table A2.5: Market Shares of Comparison Goods Shops within OCA Zones**

<b>Zone Shops</b>	<b>Market Share of Zone Comparison Goods Expenditure %</b>	<b>Market Share of OCA Comparison Goods Expenditure %</b>
<b>Zone 1</b> – Huntingdon Town	66.93%	27.51%
<b>Zone 2</b> – South East Huntingdon	2.52%	0.25%
<b>Zone 3</b> – St Ives	35.31%	7.23%
<b>Zone 4</b> – North East Huntingdon	1.62%	0.23%
<b>Zone 5</b> – Ramsey	14.44%	0.98%
<b>Zone 6</b> – South Peterborough	4.58%	0.41%
<b>Zone 7</b> – Sawtry	4.28%	0.38%
<b>Zone 8</b> – West Huntingdon	2.28%	0.19%
<b>Zone 9</b> – South Huntingdon	0.22%	0.02%
<b>Zone 10</b> – St Neots	53.61%	12.45%
<b>Zone 11</b> – North Bedford	0.09%	0.01%
<b>Zone 12</b> – North West Cambridge	2.10%	0.21%
<b>Total OCA</b>		<b>49.87%</b>

### ***Steps 6 & 7 – Trading Levels of Existing & Committed Stores***

43. As noted above, Table 7 of Appendix 4 shows the survey derived turnover of existing centres within the OCA. Table 9a sets out the benchmark turnover of existing foodstores for comparison goods and shows that the overall (benchmark) comparison goods turnover of existing foodstores in the OCA is in the region of £44m in 2013. This figure gives an indication of the likely turnover of these facilities which are not specifically identified in the Household Telephone Survey. This suggests that the survey-derived turnover of these facilities has been under-estimated and that the turnover of other facilities may have been over-estimated.



44. Based on the findings from Table 7, Table 9b of Appendix 4 shows the calculated survey derived comparison goods turnover per sq. m for Huntingdon, St Neots and St Ives Town Centres. This takes the survey derived turnover of each of the centres and divides the figure by the amount of net comparison goods floorspace within the centre (derived from GOAD Centres Database). This shows turnovers per sq. m for Huntingdon of £9,633 per sq. m, St Neots of £6,349 per sq. m and St Ives of £4,810 per sq. m. In our view the figure for Huntingdon in particular is likely to be an overstatement of the performance of the centre.
45. In our experience it is not uncommon for interview surveys (requiring a single answer response) to distort expenditure patterns where in reality respondents are visiting more than one centre and residents' expenditure is split between centres. For example all of the expenditure of residents citing Huntingdon, but who make occasional trips to Cambridge or Peterborough, will have been allocated to Huntingdon. Based on surveys of Huntingdon Centre, we believe that it is unlikely that Huntingdon comparison shops are trading above benchmark norms. As indicated above, this over-estimation may have been a result of the under-estimation of the comparison goods turnover of foodstores in the OCA.
46. Table 10a of Appendix 4 identifies the turnover of comparison goods retail commitments. There are five relevant comparison goods commitments that have been taken into account in the capacity assessment, which are the same as those for convenience goods outlined above (all commitments have elements of both convenience and comparison goods floorspace). They have a total comparison goods turnover in 2013 of £44.10m rising to £46.94m in 2016.
47. Table 10b sets out the comparison goods turnover of 'policy proposals' within the OCA. There are five relevant comparison goods policy proposals, which are essentially the comparison goods elements of the policy proposals identified in the convenience goods assessment. These have a comparison goods turnover in 2013 of £4.79m rising to £5.10m in 2016. The turnovers of these policy proposals are displayed in the final capacity scenario of the comparison goods quantitative assessment, described further below, but are not taken into account in the floorspace requirements figures.

### ***Step 8 – Capacity for Additional Comparison Goods Floorspace***

48. Tables 11, 12, and 13 of Appendix 4 utilise the information from the previous Tables to assess the levels of residual expenditure capacity within the OCA over the Study period. This follows the same approach as the equivalent tables (RTP Spreadsheets 15a, 15b and 15c) in their 2010 Study.
49. Residual expenditure capacity is converted to floorspace equivalent figures on the basis of a turnover to sales floorspace ratio of 5,000 per sq. m (consistent with the RTP Study). Further detail on how these figures are calculated is presented within the convenience goods methodology section above and within the notes to Tables 11, 12 and 13 of Appendix 4.

50. Table 11 sets out the capacity position on the assumption that the market share of the OCA remains constant from 2009 at around 50%. This shows no comparison goods expenditure capacity within the OCA following implementation of commitments until 2026. We comment on this scenario in Sections 7 and 8 of the report setting out our capacity findings.
51. Table 12 makes allowance for an increase in market share across the OCA rising to 55% by 2026 (consistent with the approach modelled in the RTP Report 2010). This shows no comparison goods expenditure capacity within the OCA following implementation of commitments until 2021.
52. As with convenience goods, we have not included expenditure capacity figures for the post 2031 period, because over such a lengthy period of time quantitative forecasts are subject of considerable uncertainty and margins of error and can therefore be misleading.



### Appendix 3 - Convenience Goods Capacity Assessment

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**Job title:**

Huntingdonshire Retail Study 2013

**Client:**

Huntingdonshire District Council

**Date:**

April 2013

Huntingdonshire District Council  
Retail Study 2013 - Convenience Goods Capacity Assessment

Table 1 - Overall Catchment Area

Zone	Constituent Postcode Sectors	Predominant Local Authority
Zone 1 - Huntingdon Town Centre	PE 29 1, PE29 3, PE29 6, PE29 7	Huntingdonshire
Zone 2 - South East Huntingdon	PE28 9, PE29 2	Huntingdonshire
Zone 3 - St Ives	PE27 3, PE27 4, PE27 5, PE27 6	Huntingdonshire
Zone 4 - North East Huntingdon	PE28 2, PE28 3	Huntingdonshire
Zone 5 - Ramsey	PE26 1, PE26 2	Huntingdonshire
Zone 6 - South Peterborough	PE7 3	Huntingdonshire
Zone 7 - Sawtry	PE28 0, PE28 5	Huntingdonshire
Zone 8 - West Huntingdon	PE28 4	Huntingdonshire
Zone 9 - South Huntingdon	PE19 5, PE19 6	Huntingdonshire
Zone 10 - St Neots	PE19 1, PE19 2, PE19 7, PE19 8	Huntingdonshire
Zone 11 - North Bedford	MK44 2, MK44 3	Bedford
Zone 12 - North-west Cambridge	CB24 3, CB24 4, CB24 5	South Cambridgeshire

Notes

1. Details taken from Spreadsheet 1 of Roger Tym and Partners March 2010 Huntingdonshire Retail Development Advice

Table 2 - Overall Catchment Area Population Projections

Zone	2013	2014	2015	2016	2021	2026	2031
Zone 1 - Huntingdon Town Centre	23,886	24,095	24,303	24,512	25,555	26,598	27,641
Zone 2 - South East Huntingdon	13,377	13,493	13,610	13,727	14,311	14,895	15,480
Zone 3 - St Ives	20,568	20,748	20,928	21,107	22,005	22,904	23,802
Zone 4 - North East Huntingdon	18,965	19,131	19,297	19,462	20,290	21,119	21,947
Zone 5 - Ramsey	11,477	11,578	11,678	11,778	12,279	12,781	13,282
Zone 6 - South Peterborough	15,502	15,637	15,773	15,908	16,585	17,262	17,939
Zone 7 - Sawtry	13,740	13,860	13,980	14,100	14,700	15,300	15,900
Zone 8 - West Huntingdon	8,768	8,845	8,921	8,998	9,381	9,764	10,147
Zone 9 - South Huntingdon	14,445	14,571	14,698	14,824	15,455	16,085	16,716
Zone 10 - St Neots	29,624	29,883	30,142	30,401	31,694	32,988	34,282
Zone 11 - North Bedford	10,718	10,841	10,957	11,073	11,633	12,168	12,664
Zone 12 - North-west Cambridge	14,700	14,910	15,101	15,301	16,179	16,923	17,505
Total Overall Catchment Area	195,772	197,592	199,387	201,191	210,068	218,786	227,303

Notes

1. Base population data for each OCA zone obtained from Experian Micromarketer in August 2012
2. Population for zones 1-10 projected using Huntingdonshire population projection data provided by Huntingdonshire District Council in December 2012 and based upon 2011 Census and East of England population forecasts
3. Population for zones 11 and 12 projected using ONS 2010-based Sub-national Population Projections published in March 2012

Table 3 - Overall Catchment Area Convenience Goods Expenditure Per Head

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Zone	2013	2014	2015	2016	2021	2026	2031
Zone 1 - Huntingdon Town Centre	£1,756	£1,756	£1,767	£1,777	£1,838	£1,913	£1,991
Zone 2 - South East Huntingdon	£2,055	£2,055	£2,067	£2,080	£2,151	£2,239	£2,330
Zone 3 - St Ives	£1,911	£1,911	£1,922	£1,934	£2,001	£2,082	£2,167
Zone 4 - North East Huntingdon	£1,998	£1,998	£2,010	£2,022	£2,092	£2,177	£2,265
Zone 5 - Ramsey	£2,019	£2,019	£2,031	£2,043	£2,114	£2,200	£2,289
Zone 6 - South Peterborough	£2,069	£2,069	£2,081	£2,094	£2,166	£2,254	£2,346
Zone 7 - Sawtry	£2,037	£2,037	£2,049	£2,062	£2,133	£2,219	£2,309
Zone 8 - West Huntingdon	£1,987	£1,987	£1,999	£2,011	£2,080	£2,165	£2,253
Zone 9 - South Huntingdon	£2,080	£2,080	£2,092	£2,105	£2,178	£2,266	£2,358
Zone 10 - St Neots	£1,909	£1,909	£1,920	£1,932	£1,999	£2,080	£2,164
Zone 11 - North Bedford	£2,134	£2,134	£2,147	£2,160	£2,234	£2,325	£2,419
Zone 12 - North-west Cambridge	£2,060	£2,060	£2,072	£2,085	£2,157	£2,244	£2,336

Notes

- 2011 prices
- Base expenditure per head data obtained from Experian Micromarketer in August 2012
- Expenditure per head projected using Experian Forecast convenience goods expenditure per head growth rates from Figure 1a , page 9 of Experian Retail Planner Briefing Note 10.1, September 2012 (2012: 0.1%, 2013: -0.1%, 2014: 0.0%, 2015-19: 0.6% and 2020-36: 0.8%)
- No growth rates published for period following 2029 therefore growth rates from 2030 onwards assumed to remain constant at 2029 level

Table 4 - Overall Catchment Area Convenience Goods Expenditure Per Head (With NSRT Deduction)

Zone	2013	2014	2015	2016	2021	2026	2031
Zone 1 - Huntingdon Town Centre	£1,716	£1,713	£1,719	£1,725	£1,767	£1,828	£1,897
Zone 2 - South East Huntingdon	£2,009	£2,004	£2,012	£2,019	£2,068	£2,139	£2,220
Zone 3 - St Ives	£1,868	£1,864	£1,871	£1,878	£1,923	£1,990	£2,065
Zone 4 - North East Huntingdon	£1,953	£1,949	£1,956	£1,963	£2,010	£2,080	£2,159
Zone 5 - Ramsey	£1,974	£1,969	£1,976	£1,984	£2,031	£2,102	£2,181
Zone 6 - South Peterborough	£2,022	£2,018	£2,025	£2,033	£2,082	£2,154	£2,235
Zone 7 - Sawtry	£1,991	£1,987	£1,994	£2,002	£2,049	£2,121	£2,201
Zone 8 - West Huntingdon	£1,942	£1,938	£1,945	£1,952	£1,999	£2,069	£2,147
Zone 9 - South Huntingdon	£2,033	£2,029	£2,036	£2,044	£2,093	£2,165	£2,247
Zone 10 - St Neots	£1,866	£1,862	£1,869	£1,876	£1,921	£1,987	£2,062
Zone 11 - North Bedford	£2,086	£2,082	£2,089	£2,097	£2,147	£2,222	£2,305
Zone 12 - North-west Cambridge	£2,014	£2,009	£2,016	£2,024	£2,073	£2,145	£2,226
Proportion of Expenditure Accounted for by NSRT Means (%)	2.3%	2.5%	2.7%	2.9%	3.9%	4.4%	4.7%

Notes

- 2011 prices
- Base expenditure per head data taken from Table 3
- NSRT = Non-Store Retail Trade = the proportion of expenditure not spent within physical shops through means such as the internet, mail order, markets, door-to-door sales, interactive television and vending machines
- Non-Store Retail Trade Deduction taken from Appendix 3, page 17 of Experian Retail Planner Briefing Note 10.1, September 2012
- NSRT deduction excludes the proportion of trade sourced from physical stores such as online delivery sourced directly from stores and 'click and collect' with 70% of sales excluded as per page 19 of Experian Retail Planner Briefing Note 10.1, September 2012
- No NSRT deduction figures published for period following 2029 therefore percentage deduction rates from 2030 onwards assumed to remain constant at 2029 level

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Table 5 - Overall Catchment Area Total Available Convenience Goods Expenditure

Zone	2013	2014	2015	2016	2021	2026	2031
Zone 1 - Huntingdon Town Centre	£41.00	£41.27	£41.77	£42.29	£45.15	£48.63	£52.44
Zone 2 - South East Huntingdon	£26.87	£27.05	£27.38	£27.72	£29.59	£31.87	£34.37
Zone 3 - St Ives	£38.42	£38.67	£39.15	£39.63	£42.31	£45.57	£49.14
Zone 4 - North East Huntingdon	£37.04	£37.28	£37.74	£38.21	£40.79	£43.93	£47.37
Zone 5 - Ramsey	£22.65	£22.80	£23.08	£23.37	£24.94	£26.86	£28.97
Zone 6 - South Peterborough	£31.35	£31.56	£31.94	£32.34	£34.52	£37.18	£40.10
Zone 7 - Sawtry	£27.36	£27.54	£27.87	£28.22	£30.13	£32.45	£34.99
Zone 8 - West Huntingdon	£17.03	£17.14	£17.35	£17.57	£18.75	£20.20	£21.78
Zone 9 - South Huntingdon	£29.37	£29.56	£29.92	£30.30	£32.34	£34.83	£37.56
Zone 10 - St Neots	£55.28	£55.64	£56.32	£57.02	£60.87	£65.56	£70.70
Zone 11 - North Bedford	£22.36	£22.56	£22.89	£23.22	£24.98	£27.03	£29.20
Zone 12 - North-west Cambridge	£29.60	£29.96	£30.45	£30.97	£33.53	£36.29	£38.96
Total Overall Catchment Area	£378.33	£381.04	£385.87	£390.86	£417.90	£450.40	£485.57

Notes

1. 2011 prices
2. Total available convenience goods expenditure calculated by multiplying population from Table 2 by expenditure per head minus NSRT deduction from Table 4







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**Table 8 - Retention Rates of Overall Catchment Area Study Zones in 2013**

Zone	Total Available Convenience Goods Expenditure Within Zone in 2013 (£m)	Expenditure Spent Within 'Home' Zone From Residents of that Zone in 2013 (£m)	Individual Zone's Retention Rate (%)
Zone 1 - Huntingdon Town Centre	£41.00	£19.82	48.35%
Zone 2 - South East Huntingdon	£26.87	£2.58	9.59%
Zone 3 - St Ives	£38.42	£23.57	61.34%
Zone 4 - North East Huntingdon	£37.04	£13.65	36.86%
Zone 5 - Ramsey	£22.65	£10.83	47.80%
Zone 6 - South Peterborough	£31.35	£7.18	22.91%
Zone 7 - Sawtry	£27.36	£3.27	11.96%
Zone 8 - West Huntingdon	£17.03	£1.44	8.47%
Zone 9 - South Huntingdon	£29.37	£2.41	8.22%
Zone 10 - St Neots	£55.28	£47.94	86.73%
Zone 11 - North Bedford	£22.36	£1.47	6.57%
Zone 12 - North-west Cambridge	£29.60	£5.17	17.48%
Total Overall Catchment Area	£378.33	£276.44	73.07%

#### Notes

1. 2011 prices
2. Retention rate calculated by dividing expenditure spent within each zone by residents of that zone from Table 7 by total available convenience goods expenditure from Table 5

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Table 9a - Benchmark Convenience Goods Turnover of Existing Facilities Within Overall Catchment Area

Zone	Facility	Gross Floorspace (sq. m)	Net Sales Floorspace (sq. m)	Proportion of Convenience Goods Floorspace (%)	Net Convenience Goods Sales Area (sq. m)	Turnover per sq. m (£) 2013	Turnover (£m) 2013	Turnover (£m) 2014	Turnover (£m) 2015	Turnover (£m) 2016	Turnover (£m) 2021	Turnover (£m) 2026	Turnover (£m) 2031
Zone 1 - Huntingdon Town Centre	Tesco Express, Wertheim Way, Huntingdon, PE29 6UQ	245	148	90%	133	£15,165	£2.02	£2.02	£2.02	£2.03	£2.04	£2.06	£2.08
	Sainsbury's, St. Germain Walk, Huntingdon, PE29 3FG	4,528	3,224	70%	2,250	£14,704	£33.09	£33.12	£33.16	£33.19	£33.42	£33.76	£34.10
	Waitrose, Prince's Street, Huntingdon, PE29 3PR	-	1,195	81%	971	£13,315	£12.93	£12.94	£12.95	£12.96	£13.06	£13.19	£13.32
Zone 2 - South East Huntingdon	Iceland, High Street, Huntingdon, PE29 3LD	-	476	97%	462	£7,714	£3.56	£3.57	£3.57	£3.57	£3.60	£3.63	£3.67
	Co-op, Cambridge Road, Godmanchester, PE29 2BT	-	228	84%	191	£8,380	£1.60	£1.60	£1.60	£1.60	£1.61	£1.63	£1.65
	One Stop, 18 The Causeway, Godmanchester, PE29 2HA	-	151	90%	136	£7,534	£1.02	£1.02	£1.03	£1.03	£1.03	£1.04	£1.06
Zone 3 - St Ives	Waitrose, Station Road, St Ives, PE27 5AN	-	1,394	81%	1,132	£13,315	£15.08	£15.09	£15.11	£15.12	£15.23	£15.38	£15.54
	Co-op, Constable Road, St Ives, PE27 3ER	2,601	1,356	84%	1,134	£8,380	£9.50	£9.51	£9.52	£9.53	£9.60	£9.69	£9.79
	One Stop, 2 Townsend Road, Needingworth, PE27 4SE	-	134	90%	121	£7,534	£0.91	£0.91	£0.91	£0.91	£0.92	£0.93	£0.94
Zone 4 - North East Huntingdon	Tesco Extra, Abbots Ripton Road, Huntingdon, PE28 2LA	9,407	4,852	72%	3,511	£12,435	£43.66	£43.71	£43.75	£43.79	£44.10	£44.54	£44.99
	Tesco Express, 89 High Street, Somersham, PE28 3EE	-	150	90%	135	£15,165	£2.05	£2.05	£2.05	£2.05	£2.07	£2.09	£2.11
	One Stop, 101 High Street, Somersham, PE28 3EE	-	134	90%	121	£7,534	£0.91	£0.91	£0.91	£0.91	£0.92	£0.93	£0.94
Zone 5 - Ramsey	Co-op, Newtown Road, Ramsey, PE26 1EJ	-	1,579	84%	1,320	£8,380	£11.07	£11.08	£11.09	£11.10	£11.18	£11.29	£11.40
Zone 6 - South Peterborough	Co-op, Bentley Avenue, Yaxley, PE7 3ZT	-	1,115	84%	932	£8,380	£7.81	£7.82	£7.83	£7.84	£7.89	£7.97	£8.05
Zone 7 - Sawtry	Co-op, Green End Road, Sawtry, PE28 5UX	-	166	84%	139	£8,380	£1.16	£1.16	£1.17	£1.17	£1.17	£1.19	£1.20
Zone 8 - West Huntingdon	Co-op, High Street, Brampton, PE28 4TQ	-	145	84%	121	£8,380	£1.02	£1.02	£1.02	£1.02	£1.03	£1.04	£1.05
Zone 9 - South Huntingdon	One Stop, 36-38 High Street, Buckden, PE19 5XP	-	134	90%	121	£7,534	£0.91	£0.91	£0.91	£0.91	£0.92	£0.93	£0.94
Zone 10 - St Neots	Tesco Extra, Barford Road, St Neots, PE19 2SA	6,100	3,372	72%	2,440	£12,435	£30.34	£30.38	£30.41	£30.44	£30.65	£30.96	£31.27
	Tesco Express, Great North Road, Eaton Socon, PE19 8EQ	358	254	90%	229	£15,165	£3.47	£3.47	£3.47	£3.48	£3.50	£3.54	£3.57
	Waitrose, Priory Lane, St Neots, PE19 2BH	-	1,273	81%	1,034	£13,315	£13.77	£13.78	£13.80	£13.81	£13.91	£14.05	£14.19
	Co-op, Tebbutts Road, St Neots, PE19 1AW	2,217	1,151	84%	962	£8,380	£8.07	£8.07	£8.08	£8.09	£8.15	£8.23	£8.31
	Co-op, Old Great North Road, Eaton Socon, PE19 8FT	-	920	84%	769	£8,380	£6.45	£6.45	£6.46	£6.47	£6.51	£6.58	£6.64
	LIDL, Cambridge Street, St Neots, PE19 1JL	-	929	73%	679	£5,225	£3.55	£3.55	£3.55	£3.56	£3.58	£3.62	£3.65
	Iceland, Market Square, St Neots, PE19 2AR	-	418	97%	406	£7,714	£3.13	£3.13	£3.14	£3.14	£3.16	£3.19	£3.22
	One Stop, Berkeley Street, St Neots, PE19 2ND	-	139	90%	125	£7,534	£0.94	£0.94	£0.94	£0.95	£0.95	£0.96	£0.97
	One Stop, 29 St Neots Road, Eaton Ford, PE19 7BA	-	134	90%	121	£7,534	£0.91	£0.91	£0.91	£0.91	£0.92	£0.93	£0.94
	M&S Simply Food, High Street, St Neots, PE19 1BN	1,203	492	95%	466	£12,216	£5.69	£5.69	£5.70	£5.70	£5.74	£5.80	£5.86
Zone 12 - North-west Cambridge	Co-op, High Street, Willingham, CB24 5ES	368	225	84%	188	£8,380	£1.58	£1.58	£1.58	£1.58	£1.59	£1.61	£1.62
	One Stop, 56-58 Church Street, Willingham	-	133	90%	120	£7,534	£0.90	£0.90	£0.90	£0.90	£0.91	£0.92	£0.93
Total Overall Catchment Area		-	26,021	-	20,468	-	£227.08	£227.31	£227.54	£227.76	£229.36	£231.67	£233.99

- Notes
- 2011 prices
  - Gross and net floorspace details for each facility taken from IGD foodstore database 2010 unless otherwise specified
  - Proportion of convenience goods floorspace and turnover per sq. m derived from Verdicit Food and Grocery Retailing in the UK 2012 and Mintel Retail Rankings 2012 unless otherwise specified
  - Turnovers projected utilising Experian forecast sales densities taken from Figure 4a, page 13 of Experian Retail Planner Briefing Note 10.1, September 2012 (Yearly percentage growth rates utilised - 2011: -3.8%, 2012: 0.1%, 2013: -0.7%, 2014-19: 0.1% and 2020-36: 0.2%)
  - No published sales density growth rates available for years post 2029 so growth assumed to remain constant over following years at 0.2% per annum 2029 level
  - Tesco Express and One Stop stores assumed to have 90% of net floorspace utilised for the sale of convenience goods
  - Net floorspace of Tesco Ramsey and Tesco Extra St Neots provided by Huntingdonshire District Council
  - Net floorspace of Tesco Express Somersham Deloitte estimate

Table 9b - Convenience Goods Turnover of Other Floorspace Within Main Town Centres Within Overall Catchment Area

Centre	Turnover from catchment in 2013 (£m)	Gross Convenience Goods Floorspace (sq. m)	Net Convenience Goods Floorspace (sq. m)	Survey-derived Turnover per sq. m (£)
Huntingdon Town Centre	£4.96	7,822	189	£26,221
St Neots Town Centre	£11.52	6,912	1,159	£9,937
St Ives Town Centre	£5.99	3,837	1,100	£5,442

- Notes
- 2011 prices
  - Gross convenience goods floorspace figures taken from GOAD Centres Database, gross figures converted to net utilising a 65% gross to net ratio
  - Net floorspace of named retailers from Table 9a deducted from resultant GOAD net floorspace figure
  - Turnover figures exclude named foodstore operators
  - Turnover from catchment in 2013 taken from Table 7

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Table 10a - Estimated Convenience Goods Turnover of Commitments Within Overall Catchment Area

Zone	Commitment	Application Reference	Gross Floorspace (sq. m)	Net Sales Floorspace (sq. m)	Proportion of Convenience Goods Floorspace (%)	Net Convenience Goods Sales Area (sq. m)	Turnover per sq. m (£) 2013	Turnover (£m) 2013	Turnover (£m) 2014	Turnover (£m) 2015	Turnover (£m) 2016	Turnover (£m) 2021	Turnover (£m) 2026	Turnover (£m) 2031	
Zone 1 - Huntingdon Town Centre	Chequers Court Foodstore	1100979FUL	1,999	1,395	70%	974	£14,704	£14.32	£14.33	£14.35	£14.36	£14.46	£14.61	£14.75	
	Chequers Court Additional Retail Units		2,685	2,014	35%	705	£3,976	£2.80	£2.81	£2.81	£2.81	£2.83	£2.86	£2.89	
	Existing Sainsburys Sub-division	10017510UT	4,528	3,396	20%	679	£4,970	£3.38	£3.38	£3.38	£3.39	£3.41	£3.44	£3.48	
	Chequers Court / Germain Walk Major Store Unit		4,355	3,700	0%	0	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
	Loss of Existing Sainsburys Store		-4,528	-3,224	70%	-2,250	£14,704	-£33.09	-£33.12	-£33.16	-£33.19	-£33.42	-£33.76	-£34.10	
Zone 2 - South East	Co-op, Cambridge Road, Godmanchester, PE29 2BT	0701280FUL	408	230	84%	192	£8,380	£1.61	£1.61	£1.61	£1.62	£1.63	£1.64	£1.66	
Zone 5 - Ramsey	Tesco, Neil Way, Ramsey, PE26 2SB	0900192REM	3,160	2,316	85%	1,969	£12,435	£24.48	£24.50	£24.53	£24.55	£24.73	£24.97	£25.22	
Zone 8 - West Huntingdon	Sainsburys Brampton Road Replacement Store	1001751FUL	9,456	5,275	68%	3,587	£14,704	£52.74	£52.80	£52.85	£52.90	£53.27	£53.81	£54.35	
	Brampton Road Additional Retail Units	1001751FUL	1,094	821	25%	205	£3,976	£0.82	£0.82	£0.82	£0.82	£0.82	£0.83	£0.84	
Zone 10 - St Neots	Station Square at Loves Farm Tesco Express	1101368OUT	410	308	90%	277	£15,165	£4.20	£4.20	£4.21	£4.21	£4.24	£4.28	£4.32	
	Station Square at Loves Farm Additional Retail Units		372	279	50%	140	£3,976	£0.55	£0.56	£0.56	£0.56	£0.56	£0.57	£0.57	
Total Overall Catchment Area			-	-	16,509	-	6,477	-	£71.81	£71.88	£71.95	£72.02	£72.53	£73.26	£73.99

Notes

- 2011 prices
- Gross and net floorspace details for each Commitment obtained from Huntingdonshire District Council unless otherwise specified
- Proportion of convenience goods floorspace and turnover per sq. m derived from Verdict Food and Grocery Retailing in the UK 2012 and Mintel Retail Rankings 2012 unless otherwise specified
- Turnovers projected utilising Experian forecast sales densities taken from Figure 4a, page 13 of Experian Retail Planner Briefing Note 10.1, September 2012 (Yearly percentage growth rates utilised - 2011: -3.8%, 2012: 0.1%, 2013: -0.7%, 2014-19: 0.1% and 2020-36: 0.2%)
- No published sales density growth rates available for years post 2028 so growth assumed to remain constant over this period at 0.2% per annum 2028 level
- Assumed Chequers Court additional retail units have a gross to net ratio of 75% and 35% of available floorspace is utilised for the sale of convenience goods with turnover per sq. m of £4,000
- Assumed Chequers Court foodstore occupied by a 'Top Five' retailer (Tesco, ASDA, Sainsburys, Morrisons or Waitrose) and average proportion of convenience goods floorspace and turnover per sq. m utilised for these retailers
- Gross floorspace of existing Sainsburys store Huntingdon taken from IGD foodstore database, assumed sub-divided using a 75% gross to net ratio and that 20% of new retail units would be used for the sale of comparison goods with a turnover per sq. m of £5,000 per sq. m as a Deloitte estimate
- Chequers Court / Germain Walk Major Store Unit floorspace taken from page 9 of Indigo Planning Statement, net floorspace provided within Huntingdonshire Council letter of 25 October 2012 and assumed that occupied by a comparison goods retailer with a comparison goods turnover per sq. m of £4,000 per sq. m as a Deloitte estimate (therefore £0m convenience goods turnover)
- Loss of existing Sainsburys store based upon proportion of convenience goods floorspace and turnover per sq. m derived from Verdict Food and Grocery Retailing in the UK 2012
- Floorspace details for Sainsburys Brampton Road replacement store taken from Indigo letter of 7 December 2013 and turnover per sq. m Sainsburys company average derived from Verdict Food and Grocery Retailing in the UK 2012
- Gross floorspace of Brampton Road additional retail units taken from Indigo letter of 7 December 2012, assumed gross to net ratio of 75% and proportion of convenience goods floorspace 25% (50% comparison, 25% services - A2-A5 and A1 services) with a turnover per sq. m of £4,000 per sq. m as a Deloitte estimate
- Proportion of Tesco Ramsey convenience goods floorspace as per Planning Permission
- Station Square at Loves Farm total floorspace taken from Decision Notice and floorspace of Tesco Express taken from Planning Statement. Assumed 75% gross to net ratio and 50% of additional floorspace used for sale of convenience goods and 50% for the sale of comparison goods

Table 10b - Estimated Convenience Goods Turnover of Policy Proposals Within Overall Catchment Area

Zone	Policy Proposal	Application Reference / Source	Gross Floorspace (sq. m)	Net Sales Floorspace (sq. m)	Proportion of Convenience Goods Floorspace (%)	Net Convenience Goods Sales Area (sq. m)	Turnover per sq. m (£) 2013	Turnover (£m) 2013	Turnover (£m) 2014	Turnover (£m) 2015	Turnover (£m) 2016	Turnover (£m) 2021	Turnover (£m) 2026	Turnover (£m) 2031
Zone 2 - South East Huntingdon	Bearscroft Farm Retail Unit	1200685OUT	857	600	84%	502	£8,380	£4.20	£4.21	£4.21	£4.22	£4.25	£4.29	£4.33
Zone 3 - St Ives	St Ives West Urban Design Framework Proposed Retail Unit	N/A	326	228	84%	191	£8,380	£1.60	£1.60	£1.60	£1.60	£1.61	£1.63	£1.65
Zone 8 - West Huntingdon	RAF Brampton Urban Design Framework Foodstore	N/A	-	228	84%	191	£8,380	£1.60	£1.60	£1.60	£1.60	£1.61	£1.63	£1.65
	RAF Brampton Urban Design Framework Additional Units	N/A	300	225	50%	113	£2,982	£0.34	£0.34	£0.34	£0.34	£0.34	£0.34	£0.35
Zone 10 - St Neots	St Neots East Urban Design Framework District Centre Foodstore	N/A	1,500	975	80%	780	£13,738	£10.72	£10.73	£10.74	£10.75	£10.82	£10.93	£11.04
	St Neots East Urban Design Framework District Centre Additional Convenience Goods Floorspace		500	375	100%	375	£2,982	£1.12	£1.12	£1.12	£1.12	£1.13	£1.14	£1.15
	St Neots East Urban Design Framework District Centre Comparison Goods Floorspace		1,000	750	0%	0	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	St Neots East Urban Design Framework Local Centre Comparison Goods Floorspace		500	375	0%	0	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	St Neots East Urban Design Framework Local Centre Convenience Goods Floorspace		500	375	100%	375	£2,485	£0.93	£0.93	£0.93	£0.93	£0.94	£0.95	£0.96
Total Overall Catchment Area			-	4,131	-	2,526	-	£20.50	£20.52	£20.54	£20.56	£20.71	£20.92	£21.13

**Notes**

- 2011 prices
- Gross and net floorspace details for each Commitment obtained from Huntingdonshire District Council unless otherwise specified
- Proportion of convenience goods floorspace and turnover per sq. m derived from Verdict Food and Grocery Retailing in the UK 2012 and Mintel Retail Rankings 2012 unless otherwise specified
- Turnovers projected utilising Experian forecast sales densities taken from Figure 4a, page 13 of Experian Retail Planner Briefing Note 10.1, September 2012 (Yearly percentage growth rates utilised - 2011: -3.8%, 2012: 0.1%, 2013: -0.7%, 2014-19: 0.1% and 2020-36: 0.2%)
- No published sales density growth rates available for years post 2028 so growth assumed to remain constant over this period at 0.2% per annum 2028 level
- Assumed that St Neots East Urban Design Framework District Centre to contain foodstore of 1,500 sq. m gross occupied by 'Top Five' retailer with gross to net ratio of 75% and 80% convenience goods floorspace in addition to a further 500 sq. m of convenience goods floorspace and 1,000 sq. m of comparison goods floorspace, turnover per sq. m of £3,000 in 2010 Deloitte estimate
- Assumed that St Neots East Urban Design Framework Local Centre to contain 500 sq. m of convenience and 500 sq. m of comparison goods floorspace, turnover per sq. m of £2,500 in 2010 Deloitte estimate
- Assumed that St Ives West Urban Design Framework foodstore is the same size as the Co-op Ramsey and is operated by a retailer with similar trading characteristics to the Co-op, assumed gross to net ratio of 70%
- Assumed Bearscroft Farm retail unit has a gross to net ratio of 70% and is occupied by a retailer with the same (or similar) trading characteristics as the Co-op

Table 10c - Estimated Convenience Goods Turnover of Alconbury Proposals

Zone	Alconbury	Application Reference / Source	Gross Floorspace (sq. m)	Net Sales Floorspace (sq. m)	Proportion of Convenience Goods Floorspace (%)	Net Convenience Goods Sales Area (sq. m)	Turnover per sq. m (£) 2013	Turnover (£m) 2013	Turnover (£m) 2014	Turnover (£m) 2015	Turnover (£m) 2016	Turnover (£m) 2021	Turnover (£m) 2026	Turnover (£m) 2031
Zone 8 - West Huntingdon	Alconbury Weald Foodstore	1201158OUT	1,500	1,000	100%	1,000	£13,844	£13.84	£13.86	£13.87	£13.89	£13.98	£14.12	£14.27
	Alconbury Weald Additional Convenience Goods Floorspace		1,000	750	100%	750	£2,982	£2.24	£2.24	£2.24	£2.24	£2.28	£2.30	
	Alconbury Weald Comparison Goods Floorspace		2,000	1,500	0%	0	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	
	Total		-	3,250	-	1,750	-	£16.08	£16.10	£16.11	£16.13	£16.24	£16.41	£16.57

**Notes**

- 2011 prices
- Gross and net floorspace details for each Commitment obtained from Huntingdonshire District Council unless otherwise specified
- Proportion of convenience goods floorspace and turnover per sq. m derived from Verdict Food and Grocery Retailing in the UK 2012 and Mintel Retail Rankings 2012 unless otherwise specified
- Turnovers projected utilising Experian forecast sales densities taken from Figure 4a, page 13 of Experian Retail Planner Briefing Note 10.1, September 2012 (Yearly percentage growth rates utilised - 2011: -3.8%, 2012: 0.1%, 2013: -0.7%, 2014-19: 0.1% and 2020-36: 0.2%)
- No published sales density growth rates available for years post 2028 so growth assumed to remain constant over this period at 0.2% per annum 2028 level
- Alconbury Weald Foodstore floorspace details obtained from Table 14 of submitted Retail Impact Assessment and occupied by 'Top Five' foodstore operator
- Assumed that of 7,000 sq. m A1-A5 floorspace proposed at Alconbury Weald, 1,500 sq. m is occupied by the proposed foodstore, 2,000 sq. m of comparison goods floorspace and a further 1,000 sq. m of convenience goods floorspace with gross to net ratio of 75%
- Alconbury Weald convenience goods floorspace turnover per sq. m of £3,000 in 2010 Deloitte estimate

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Table 11 - Summary of Capacity for Convenience Goods Floorspace - Existing Retention Rate

Equivalent Row From RTP Study	Overall Catchment Area	2013	2014	2015	2016	2021	2026	2031
A	Total Available Convenience Goods Expenditure (€m)	€378.33	€381.04	€385.87	€390.86	€417.90	€450.40	€485.57
B	Current Retention Rate of Overall Catchment Area (%)	73.07%	73.07%	73.07%	73.07%	73.07%	73.07%	73.07%
C	Retained Expenditure (€m) [AxB]	€276.44	€278.42	€281.95	€285.59	€305.35	€329.10	€354.80
D	Turnover of Existing Facilities (€m)	€276.44	€276.72	€277.00	€277.27	€279.22	€282.02	€284.85
G	Turnover of Commitments (€m)	€71.81	€71.88	€71.95	€72.02	€72.53	€73.26	€73.99
H	Residual Expenditure Capacity (€m) [C-D-G]	-€71.81	-€70.18	-€67.00	-€63.70	-€46.40	-€26.18	-€4.05
-	Indicative Turnover of Pipeline Developments	€20.50	€20.52	€20.54	€20.56	€20.71	€20.92	€21.13
-	'Top Five' Foodstore Turnover per sq. m (€)	€13.738	€13.752	€13.765	€13.779	€13.876	€14.015	€14.156
I1	Net Floorspace Equivalent 'Top Five' Foodstore (sq. m)	-5,227	-5,103	-4,867	-4,623	-3,344	-1,868	-286
-	'Discounter' Foodstore Turnover per sq. m (€)	€7.175	€7.182	€7.189	€7.196	€7.247	€7.319	€7.393
I2	Net Floorspace Equivalent 'Discounter' Foodstore (sq. m)	-10,009	-9,772	-9,320	-8,852	-6,403	-3,577	-547
J1	Gross Floorspace Equivalent 'Top Five' Foodstore (sq. m)	-8,041	-7,851	-7,488	-7,112	-5,144	-2,874	-440
J2	Gross Floorspace Equivalent 'Discounter' Foodstore (sq. m)	-13,345	-13,029	-12,427	-11,803	-8,537	-4,769	-730

Notes

- 2011 prices
- No row E as per RTP Study as increase in turnover of existing facilities over time built into figures within row D. RTP Study does not contain a row F
- Total available convenience goods expenditure obtained from Table 5, current retention rate obtained from Table 8, turnover of existing facilities from Table 7 and turnover of Commitments from Table 9
- Turnovers of existing facilities and Commitments projected utilising Experian forecast sales densities taken from Figure 4a, page 13 of Experian Retail Planner Briefing Note 10.1, September 2012 (Yearly percentage growth rates utilised - 2011: -3.8%, 2 012: 0.1%, 2013: -0.7%, 2014: 19.0.1% and 2020: 36.0.2%)
- No published sales density growth rates available for years post 2029 so growth assumed to remain constant over this period at 0.2% per annum 2029 level
- Net floorspace equivalent for 'Top Five' foodstore retailers divides the expenditure capacity by an average of the convenience goods turnover per sq. m of Tesco, ASDA, Sainsbury's, Morrisons and Waitrose (€13,738 per sq. m in 2013 in 2011 prices)
- Net floorspace equivalent for 'Discounter' foodstore retailers divides the expenditure capacity by an average of the convenience goods turnover per sq. m of Aldi, LIDL, Iceland and Farmfoods (€7,175 per sq. m in 2013 in 2011 prices)
- Gross floorspace equivalent for 'Top Four' foodstore retailers assumes a gross to net ratio of 65% and gross floorspace equivalent for 'Discounter' foodstore retailers assumes a gross to net ratio of 75%
- Turnover of pipeline developments taken from Table 10b and includes retail proposals for which there is specific policy support for a particular quantum of retail floorspace - floorspace equivalent capacity figures do not take into account the turnover/pipeline developments
- All floorspace figures are indicative and the 'capacity' for a particular proposal will depend upon the specific net sales area and turnover per sq. m of any relevant convenience goods proposal

Table 12 - Summary of Capacity for Convenience Goods Floorspace - Increase in Retention Rate to 80% by 2026

Equivalent Row From RTP Study	Overall Catchment Area	2013	2014	2015	2016	2021	2026	2031
A	Total Available Convenience Goods Expenditure (€m)	€378.33	€381.04	€385.87	€390.86	€417.90	€450.40	€485.57
B	Retention Rate of Overall Catchment Area (%)	74.00%	74.00%	75.00%	75.00%	78.00%	80.00%	80.00%
C	Retained Expenditure (€m) [AxB]	€279.97	€281.97	€289.40	€293.14	€325.96	€360.32	€388.46
D	Turnover of Existing Facilities (€m)	€276.44	€276.72	€277.00	€277.27	€279.22	€282.02	€284.85
G	Turnover of Commitments (€m)	€71.81	€71.88	€71.95	€72.02	€72.53	€73.26	€73.99
H	Residual Expenditure Capacity (€m) [C-D-G]	-€68.28	-€66.63	-€59.55	-€56.15	-€26.79	€5.04	€29.61
-	Indicative Turnover of Pipeline Developments	€20.50	€20.52	€20.54	€20.56	€20.71	€20.92	€21.13
-	'Top Five' Foodstore Turnover per sq. m (€)	€14.424	€14.438	€14.453	€14.467	€14.569	€14.715	€14.863
I1	Net Floorspace Equivalent 'Top Five' Foodstore (sq. m)	-4,734	-4,615	-4,120	-3,881	-1,770	343	1,992
-	'Discounter' Foodstore Turnover per sq. m (€)	€6.394	€6.401	€6.407	€6.414	€6.459	€6.523	€6.589
I2	Net Floorspace Equivalent 'Discounter' Foodstore (sq. m)	-10,678	-10,469	-9,294	-8,755	-3,993	775	4,494
J1	Gross Floorspace Equivalent 'Top Five' Foodstore (sq. m)	-7,283	-7,099	-6,339	-5,971	-2,723	527	3,065
J2	Gross Floorspace Equivalent 'Discounter' Foodstore (sq. m)	-14,238	-13,879	-12,392	-11,674	-5,324	1,031	5,992

Notes

- 2011 prices
- No row E as per RTP Study as increase in turnover of existing facilities over time built into figures within row D. RTP Study does not contain a row F
- Total available convenience goods expenditure obtained from Table 5, current retention rate obtained from Table 8, turnover of existing facilities from Table 7 and turnover of Commitments from Table 9
- Turnovers of existing facilities and Commitments projected utilising Experian forecast sales densities taken from Figure 4a, page 13 of Experian Retail Planner Briefing Note 10.1, September 2012 (Yearly percentage growth rates utilised - 2011: -3.8%, 2 012: 0.1%, 2013: -0.7%, 2014: 19.0.1% and 2020: 36.0.2%)
- No published sales density growth rates available for years post 2029 so growth assumed to remain constant over this period at 0.2% per annum 2029 level
- Net floorspace equivalent for 'Top Five' foodstore retailers divides the expenditure capacity by an average of the convenience goods turnover per sq. m of Tesco, ASDA, Sainsbury's, Morrisons and Waitrose (€13,738 per sq. m in 2013 in 2011 prices)
- Net floorspace equivalent for 'Discounter' foodstore retailers divides the expenditure capacity by an average of the convenience goods turnover per sq. m of Aldi, LIDL, Iceland and Farmfoods (€7,175 per sq. m in 2013 in 2011 prices)
- Gross floorspace equivalent for 'Top Four' foodstore retailers assumes a gross to net ratio of 65% and gross floorspace equivalent for 'Discounter' foodstore retailers assumes a gross to net ratio of 75%
- Retention rate increased from 2012 base at a rate of 1% every 2 years up to 80% in 2025 following which the rate remains constant
- Turnover of pipeline developments taken from Table 10b and includes retail proposals for which there is specific policy support for a particular quantum of retail floorspace - floorspace equivalent capacity figures do not take into account the turnover/pipeline developments
- All floorspace figures are indicative and the 'capacity' for a particular proposal will depend upon the specific net sales area and turnover per sq. m of any relevant convenience goods proposal



## Appendix 4 - Comparison Goods Capacity Assessment

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**Job title:**

Huntingdonshire Retail Study 2013

**Client:**

Huntingdonshire District Council

**Date:**

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Huntingdonshire District Council  
Retail Study 2013 - Comparison Goods Capacity Assessment

Table 1 - Study Area

Zone	Constituent Postcode Sectors	Predominant Local Authority
Zone 1 - Huntingdon Town Centre	PE 29 1, PE29 3, PE29 6, PE29 7	Huntingdonshire
Zone 2 - South East Huntingdon	PE28 9, PE29 2	Huntingdonshire
Zone 3 - St Ives	PE27 3, PE27 4, PE27 5, PE27 6	Huntingdonshire
Zone 4 - North East Huntingdon	PE28 2, PE28 3	Huntingdonshire
Zone 5 - Ramsey	PE26 1, PE26 2	Huntingdonshire
Zone 6 - South Peterborough	PE7 3	Huntingdonshire
Zone 7 - Sawtry	PE28 0, PE28 5	Huntingdonshire
Zone 8 - West Huntingdon	PE28 4	Huntingdonshire
Zone 9 - South Huntingdon	PE19 5, PE19 6	Huntingdonshire
Zone 10 - St Neots	PE19 1, PE19 2, PE19 7, PE19 8	Huntingdonshire
Zone 11 - North Bedford	MK44 2, MK44 3	Bedford
Zone 12 - North-west Cambridge	CB24 3, CB24 4, CB24 5	South Cambridgeshire

Notes

1. Details taken from Spreadsheet 1 of Roger Tym and Partners March 2010 Huntingdonshire Retail Development Advice

Table 2 - Study Area Population Projections

Zone	2013	2014	2015	2016	2021	2026	2031
Zone 1 - Huntingdon Town Centre	23,886	24,095	24,303	24,512	25,555	26,598	27,641
Zone 2 - South East Huntingdon	13,377	13,493	13,610	13,727	14,311	14,895	15,480
Zone 3 - St Ives	20,568	20,748	20,928	21,107	22,005	22,904	23,802
Zone 4 - North East Huntingdon	18,965	19,131	19,297	19,462	20,290	21,119	21,947
Zone 5 - Ramsey	11,477	11,578	11,678	11,778	12,279	12,781	13,282
Zone 6 - South Peterborough	15,502	15,637	15,773	15,908	16,585	17,262	17,939
Zone 7 - Sawtry	13,740	13,860	13,980	14,100	14,700	15,300	15,900
Zone 8 - West Huntingdon	8,768	8,845	8,921	8,998	9,381	9,764	10,147
Zone 9 - South Huntingdon	14,445	14,571	14,698	14,824	15,455	16,085	16,716
Zone 10 - St Neots	29,624	29,883	30,142	30,401	31,694	32,988	34,282
Zone 11 - North Bedford	10,718	10,841	10,957	11,073	11,633	12,168	12,664
Zone 12 - North-west Cambridge	14,700	14,910	15,101	15,301	16,179	16,923	17,505
Total Study Area	195,772	197,592	199,387	201,191	210,068	218,786	227,303

Notes

1. Base population data obtained from Experian Micromarketer in August 2012
2. Population projected using ONS 2010-based Sub-nation Population Projections published in March 2012

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**Table 3 - Study Area Comparison Goods Expenditure Per Head**

Zone	2013	2014	2015	2016	2021	2026	2031
Zone 1 - Huntingdon Town Centre	£2,938	£3,008	£3,096	£3,185	£3,675	£4,239	£4,891
Zone 2 - South East Huntingdon	£3,657	£3,745	£3,854	£3,965	£4,575	£5,278	£6,089
Zone 3 - St Ives	£3,275	£3,354	£3,451	£3,551	£4,097	£4,727	£5,453
Zone 4 - North East Huntingdon	£3,584	£3,670	£3,776	£3,886	£4,483	£5,172	£5,967
Zone 5 - Ramsey	£3,216	£3,294	£3,389	£3,487	£4,023	£4,642	£5,355
Zone 6 - South Peterborough	£3,639	£3,726	£3,834	£3,945	£4,551	£5,251	£6,058
Zone 7 - Sawtry	£3,689	£3,778	£3,887	£4,000	£4,615	£5,324	£6,142
Zone 8 - West Huntingdon	£3,564	£3,650	£3,756	£3,865	£4,459	£5,144	£5,934
Zone 9 - South Huntingdon	£3,700	£3,788	£3,898	£4,011	£4,628	£5,339	£6,159
Zone 10 - St Neots	£3,161	£3,237	£3,330	£3,427	£3,954	£4,561	£5,262
Zone 11 - North Bedford	£3,786	£3,877	£3,990	£4,105	£4,736	£5,464	£6,303
Zone 12 - North-west Cambridge	£3,737	£3,826	£3,937	£4,052	£4,674	£5,392	£6,221

Notes

- 2011 Prices
- Base expenditure per head data obtained from Experian Micromarketer in August 2012
- Expenditure per head projected using Experian Forecast comparison goods expenditure per head growth rates from Figure 1a and 1b, page 9 of Experian Retail Planner Briefing Note 10.1 September 2012 (2012: 1.4%, 2013: 1.8% and 2014: 2.4% and 2015-36: 2%)
- No growth rates published for period following 2029 therefore growth rates from 2030 onwards assumed to remain constant at 2029 level

**Table 4 - Study Area Comparison Goods Expenditure Per Head (With NSRT Deduction)**

Zone	2013	2014	2015	2016	2021	2026	2031
Zone 1 - Huntingdon Town Centre	£2,623	£2,663	£2,719	£2,774	£3,096	£3,559	£4,106
Zone 2 - South East Huntingdon	£3,265	£3,315	£3,385	£3,454	£3,854	£4,431	£5,111
Zone 3 - St Ives	£2,924	£2,969	£3,032	£3,093	£3,452	£3,968	£4,578
Zone 4 - North East Huntingdon	£3,200	£3,249	£3,318	£3,385	£3,777	£4,342	£5,009
Zone 5 - Ramsey	£2,872	£2,916	£2,977	£3,038	£3,390	£3,897	£4,495
Zone 6 - South Peterborough	£3,248	£3,298	£3,368	£3,436	£3,835	£4,408	£5,085
Zone 7 - Sawtry	£3,294	£3,344	£3,415	£3,484	£3,888	£4,469	£5,156
Zone 8 - West Huntingdon	£3,182	£3,231	£3,299	£3,366	£3,756	£4,318	£4,982
Zone 9 - South Huntingdon	£3,303	£3,354	£3,425	£3,494	£3,899	£4,482	£5,171
Zone 10 - St Neots	£2,822	£2,865	£2,926	£2,985	£3,331	£3,829	£4,417
Zone 11 - North Bedford	£3,380	£3,432	£3,505	£3,576	£3,990	£4,587	£5,292
Zone 12 - North-west Cambridge	£3,336	£3,387	£3,459	£3,529	£3,938	£4,527	£5,222
Proportion of Expenditure Accounted for by NSRT Means (%)	10.7%	11.5%	12.2%	12.9%	15.8%	16.1%	16.1%

Notes

- 2011 Prices
- Base expenditure per head data taken from Table 3
- NSRT = Non-Store Retail Trade = the proportion of expenditure not spent within physical shops through means such as the internet, mail order, markets, door-to-door sales, interactive television and vending machines
- Non-Store Retail Trade Deduction taken from Appendix 3, page 17 of Experian Retail Planner Briefing Note 10.1, September 2012
- NSRT deduction excludes the proportion of trade sourced from physical stores such as online delivery sourced directly from stores and 'click and collect' as per advised proportion of 30% from page 19 of Experian Retail Planner Briefing Note 10.1, September 2012
- No NSRT deduction figures published for period following 2029 therefore percentage deduction rates from 2030 onwards assumed to remain constant at 2029 level



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Table 5 - Study Area Total Available Comparison Goods Expenditure

Zone	2013	2014	2015	2016	2021	2026	2031
Zone 1 - Huntingdon Town Centre	£62.65	£64.17	£66.09	£68.01	£79.12	£94.66	£113.49
Zone 2 - South East Huntingdon	£43.68	£44.73	£46.08	£47.41	£55.16	£66.00	£79.12
Zone 3 - St Ives	£60.14	£61.60	£63.45	£65.29	£75.96	£90.88	£108.95
Zone 4 - North East Huntingdon	£60.68	£62.15	£64.02	£65.87	£76.64	£91.69	£109.93
Zone 5 - Ramsey	£32.96	£33.76	£34.77	£35.78	£41.62	£49.80	£59.71
Zone 6 - South Peterborough	£50.36	£51.58	£53.13	£54.66	£63.60	£76.09	£91.23
Zone 7 - Sawtry	£45.25	£46.35	£47.74	£49.13	£57.15	£68.38	£81.98
Zone 8 - West Huntingdon	£27.90	£28.58	£29.44	£30.29	£35.24	£42.16	£50.55
Zone 9 - South Huntingdon	£47.71	£48.87	£50.33	£51.79	£60.25	£72.09	£86.43
Zone 10 - St Neots	£83.59	£85.62	£88.19	£90.74	£105.57	£126.31	£151.44
Zone 11 - North Bedford	£36.23	£37.21	£38.40	£39.59	£46.42	£55.81	£67.01
Zone 12 - North-west Cambridge	£49.04	£50.51	£52.23	£54.00	£63.71	£76.61	£91.42
Total Study Area	£600.19	£615.13	£633.87	£652.56	£760.43	£910.49	£1,091.26

Notes

1. 2011 Prices
2. Total available comparison goods expenditure calculated by multiplying population from Table 2 by expenditure per head minus NSRT deduction from Table 4

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Table 6 - Comparison Goods Spending Patterns as a Percentage Across Overall Catchment Area Zones

Zone	Facility	Zone 1 - Huntingdon Town Centre	Zone 2 - South East Huntingdon	Zone 3 - St Ives	Zone 4 - North East Huntingdon	Zone 5 - Ramsey	Zone 6 - South Peterborough	Zone 7 - Sawtry	Zone 8 - West Huntingdon	Zone 9 - South Huntingdon	Zone 10 - St Neots	Zone 11 - North Bedford	Zone 12 - North-west Cambridge
Zone 1 - Huntingdon Town Centre	Huntingdon Town Centre	53.55%	30.95%	18.78%	33.87%	24.81%	1.10%	22.79%	40.73%	15.03%	5.24%	0.46%	3.31%
	Stukeley Road Retail Park, Huntingdon	9.15%	7.85%	4.54%	6.11%	6.15%	0.89%	6.99%	9.19%	4.92%	1.34%	0.00%	2.84%
	Huntingdon Retail Park, Huntingdon	4.06%	0.26%	3.39%	2.20%	1.16%	0.00%	1.68%	1.46%	1.33%	0.20%	0.12%	0.42%
	Other Zone 1	0.17%	1.28%	0.66%	1.01%	0.00%	0.00%	0.00%	0.26%	0.25%	0.06%	0.00%	6.10%
Zone 2 - South East Huntingdon	Total Zone 1	66.93%	40.34%	27.77%	43.19%	1.99%	31.46%	51.84%	21.53%	6.84%	0.58%	0.00%	12.67%
	Other Zone 2	0.24%	2.52%	0.14%	0.17%	0.00%	0.00%	0.00%	0.22%	0.00%	0.00%	0.00%	0.00%
	Total Zone 2	0.24%	2.52%	0.14%	0.17%	0.00%	0.00%	0.00%	0.22%	0.00%	0.00%	0.00%	0.00%
Zone 3 - St Ives	St Ives Town Centre	1.86%	14.75%	35.25%	15.81%	1.49%	0.00%	0.76%	1.21%	0.95%	0.27%	0.16%	6.21%
	Other Zone 3	0.00%	0.00%	0.06%	0.03%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
	Total Zone 3	1.86%	14.75%	35.31%	15.84%	1.49%	0.00%	0.76%	1.21%	0.95%	0.27%	0.16%	6.21%
Zone 4 - North East Huntingdon	Other Zone 4	0.15%	0.19%	0.03%	1.62%	0.35%	0.00%	0.17%	0.00%	0.00%	0.00%	0.00%	0.00%
	Total Zone 4	0.15%	0.19%	0.03%	1.62%	0.35%	0.00%	0.17%	0.00%	0.00%	0.00%	0.00%	0.00%
	Other Zone 5	0.05%	0.00%	0.00%	1.37%	14.44%	0.30%	0.12%	0.11%	0.00%	0.00%	0.12%	0.00%
Zone 5 - Ramsey	Total Zone 5	0.05%	0.00%	0.00%	1.37%	14.44%	0.30%	0.12%	0.11%	0.00%	0.00%	0.12%	0.00%
	Yaxley Village Centre	0.12%	0.00%	0.00%	0.00%	0.00%	4.58%	0.00%	0.00%	0.14%	0.00%	0.00%	0.00%
	Total Zone 6	0.12%	0.00%	0.00%	0.00%	0.00%	4.58%	0.00%	0.00%	0.14%	0.00%	0.00%	0.00%
Zone 6 - South Peterborough	Sawtry Village Centre	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	1.36%	0.00%	0.00%	0.00%	0.00%	0.00%
	Other Zone 7	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	2.92%	0.13%	0.00%	0.00%	0.66%	0.00%
	Total Zone 7	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.28%	0.13%	0.00%	0.00%	0.66%	0.00%
Zone 8 - West Huntingdon	Other Zone 8	0.20%	0.07%	0.00%	0.00%	0.00%	0.18%	0.00%	2.28%	0.00%	0.31%	0.00%	0.00%
	Total Zone 8	0.20%	0.07%	0.00%	0.00%	0.00%	0.18%	0.00%	2.28%	0.00%	0.31%	0.00%	0.00%
	Other Zone 9	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.22%	0.00%	0.00%	0.00%	0.00%
Zone 9 - South Huntingdon	Total Zone 9	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.22%	0.00%	0.00%	0.00%	0.00%
	St Neots Town Centre	0.70%	0.54%	0.18%	0.60%	0.15%	0.00%	8.97%	1.55%	31.19%	45.20%	10.66%	2.27%
	B&O Easton Seccon, St Neots	0.14%	0.25%	0.07%	0.21%	0.05%	0.00%	1.36%	0.59%	5.72%	7.56%	2.85%	0.14%
	Other St Neots	0.04%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.63%	0.85%	0.99%	0.00%	0.00%
Zone 10 - St Neots	Total Zone 10	0.88%	0.79%	0.25%	0.81%	0.20%	0.00%	10.33%	2.14%	37.54%	53.61%	13.60%	4.41%
	Other Zone 11	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.99%	0.00%
	Total Zone 11	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.99%	0.00%
Zone 12 - North-west Cambridge	Other Zone 12	0.00%	0.05%	0.00%	0.04%	0.18%	0.00%	0.13%	0.00%	0.00%	0.00%	0.23%	2.10%
	Total Zone 12	0.00%	0.05%	0.00%	0.04%	0.18%	0.00%	0.13%	0.00%	0.00%	0.00%	0.23%	2.10%
Total Overall Catchment Area		70.43%	58.21%	63.50%	63.04%	48.78%	7.05%	47.25%	57.93%	60.38%	61.03%	15.44%	21.48%
Buffer 1 - Peterborough	Peterborough City Centre	13.39%	9.34%	8.49%	12.74%	36.87%	53.68%	30.04%	23.51%	10.42%	4.34%	0.66%	1.11%
	Serpentine Green Shopping Centre, Peterborough	0.41%	0.00%	0.00%	0.19%	1.86%	15.43%	3.45%	0.00%	0.14%	0.00%	0.00%	0.31%
	Bourges Retail Park, Peterborough	0.49%	0.00%	0.08%	0.25%	1.05%	3.39%	1.42%	0.33%	0.00%	0.00%	0.00%	0.00%
	The Boulevard Retail Park, Peterborough	0.28%	0.00%	0.00%	0.41%	0.81%	4.55%	1.35%	0.17%	0.09%	0.00%	0.00%	0.00%
	Brotherhood Retail Park, Peterborough	0.08%	0.14%	0.06%	0.14%	0.00%	2.77%	0.60%	0.38%	0.00%	0.04%	0.00%	0.00%
	Other Buffer 1	0.35%	0.32%	0.21%	0.48%	2.49%	5.60%	0.87%	0.73%	0.21%	0.32%	0.00%	0.43%
	Total Buffer 1	15.00%	9.80%	8.84%	14.21%	43.08%	85.42%	37.73%	25.12%	10.86%	4.70%	0.66%	1.85%
Buffer 2 - Fenland	Other Buffer 2	0.11%	0.00%	0.00%	0.20%	0.48%	0.00%	0.09%	0.16%	0.00%	0.00%	0.00%	0.00%
	Total Buffer 2	0.11%	0.00%	0.00%	0.20%	0.48%	0.00%	0.09%	0.16%	0.00%	0.00%	0.00%	0.00%
	Cambridge City Centre	7.49%	22.99%	23.00%	12.68%	3.39%	0.19%	2.75%	6.12%	9.18%	6.72%	2.73%	50.58%
Buffer 3 - Cambridge	Cambridge Retail Park	0.49%	0.45%	0.44%	0.81%	0.00%	0.00%	0.00%	0.15%	0.39%	0.44%	0.13%	11.76%
	Other Buffer 3	0.82%	0.40%	1.24%	1.67%	0.21%	0.00%	0.63%	0.00%	0.22%	0.23%	0.21%	3.94%
	Total Buffer 3	8.80%	23.84%	24.68%	15.16%	3.60%	0.19%	3.38%	6.27%	9.79%	7.39%	3.07%	66.28%
Buffer 4 - North-east Bedfordshire	Biggleswade Town Centre	0.03%	0.00%	0.00%	0.28%	0.00%	0.00%	0.56%	0.00%	0.75%	1.27%	3.33%	0.00%
	Other Buffer 4	0.24%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.67%	1.03%	1.63%	0.13%	
	Total Buffer 4	0.27%	0.00%	0.00%	0.28%	0.00%	0.00%	0.56%	0.00%	1.42%	2.30%	4.96%	0.13%
Buffer 5 - Bedford	Bedford Town Centre	0.59%	0.86%	0.17%	0.20%	0.29%	0.12%	1.32%	1.56%	6.76%	10.88%	38.59%	0.52%
	Interchange Retail Park, Kempston, Bedford	0.56%	0.11%	0.00%	0.20%	0.00%	0.00%	1.12%	0.23%	3.49%	4.58%	12.59%	0.44%
	St Johns Centre (including Homebase), Rope Walk, Bedford	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.50%	3.66%	0.10%
	Other Buffer 5	0.21%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.85%	1.84%	6.73%	0.30%	
	Total Buffer 5	1.36%	0.97%	0.17%	0.40%	0.29%	0.12%	2.62%	1.79%	11.10%	17.80%	61.57%	1.36%
Buffer 6 - Thrapston and Raunds	Other Buffer 6	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.13%	0.00%	0.00%	0.00%	0.00%	0.00%
	Total Buffer 6	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.13%	0.00%	0.00%	0.00%	0.00%	0.00%
Buffer 7 - East Northamptonshire	Other Buffer 7	0.00%	0.26%	0.00%	0.00%	0.00%	0.67%	0.45%	0.45%	0.00%	0.00%	0.00%	0.14%
	Total Buffer 7	25.54%	34.87%	33.69%	30.25%	47.45%	86.40%	44.56%	33.79%	33.17%	32.19%	70.26%	69.76%
Outside Overall Catchment Area and Buffers	Milton Keynes Town Centre	1.13%	0.63%	0.48%	0.61%	0.35%	1.14%	1.29%	1.86%	2.21%	2.80%	9.25%	0.33%
	London City Centre	0.58%	0.91%	0.58%	0.67%	0.14%	0.36%	0.88%	1.68%	1.33%	0.58%	1.06%	0.35%
	Ely City Centre	0.00%	0.07%	0.00%	1.60%	0.17%	0.00%	0.00%	0.26%	0.00%	0.00%	0.00%	1.64%
	Other Outside Catchment Area and Buffers	2.34%	4.81%	1.75%	3.83%	3.11%	5.05%	5.61%	4.49%	2.91%	3.41%	3.98%	6.44%
Total Outside Catchment Area and Buffers		4.05%	6.42%	2.81%	6.71%	3.77%	6.55%	7.78%	8.29%	6.45%	6.79%	14.29%	8.76%
Overall Total		100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Notes

1. Details obtained from Spreadsheet 5 of RTP Huntingdonshire District Council Huntingdonshire Retail Development Advice, March 2010
2. Figures may not correspond exactly with those in RTP Study due to rounding adjustments

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Table 7 - Comparison Goods Flows of Expenditure Across Overall Catchment Area Zones in 2013 (£m)

Zone	Facility	Zone 1 - Huntingdon Town Centre	Zone 2 - South East Huntingdon	Zone 3 - St Ives	Zone 4 - North East Huntingdon	Zone 5 - Ramsey	Zone 6 - South Peterborough	Zone 7 - Sawtry	Zone 8 - West Huntingdon	Zone 9 - South Huntingdon	Zone 10 - St Neots	Zone 11 - North Bedford	Zone 12 - North-west Cambridge	Total Overall Catchment Area (£m)	Market Share of Facility from Overall Catchment Area (%)	
Zone 1 - Huntingdon Town Centre	Huntingdon Town Centre	£33.55	£13.52	£11.29	£20.55	£8.18	£0.55	£10.31	£11.36	£7.17	£4.38	£0.17	£1.62	£122.65	20.44%	
	Stukeley Road Retail Park, Huntingdon	£5.73	£3.43	£2.73	£3.71	£2.03	£0.45	£3.16	£2.56	£2.35	£1.12	£0.00	£1.39	£26.66	4.78%	
	Huntingdon Retail Park, Huntingdon	£2.54	£0.11	£2.28	£1.33	£0.38	£0.00	£0.76	£0.46	£0.63	£0.17	£0.04	£0.21	£8.93	1.49%	
	Other Zone 1	£0.11	£0.56	£0.40	£0.61	£0.00	£0.00	£0.00	£0.07	£0.12	£0.05	£0.00	£2.99	£4.91	0.82%	
Total Zone 1		£41.93	£17.62	£16.70	£26.21	£10.99	£1.00	£14.24	£14.46	£10.27	£5.72	£0.21	£6.21	£165.16	27.52%	
Zone 2 - South East Huntingdon	Other Zone 2	£0.15	£1.10	£0.08	£0.10	£0.00	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£1.50	0.25%	
	Total Zone 2	£0.15	£1.10	£0.08	£0.10	£0.00	£0.00	£0.00	£0.06	£0.00	£0.00	£0.00	£0.00	£1.50	0.25%	
	St Ives Town Centre	£1.17	£6.44	£21.20	£9.59	£0.49	£0.00	£0.34	£0.34	£0.45	£0.23	£0.06	£3.05	£43.36	7.22%	
Zone 3 - St Ives	Other Zone 3	£0.00	£0.00	£0.04	£0.02	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	0.01%	
	Total Zone 3	£1.17	£6.44	£21.24	£9.61	£0.49	£0.00	£0.34	£0.34	£0.45	£0.23	£0.06	£3.05	£43.41	7.23%	
	Other Zone 4	£0.09	£0.08	£0.02	£0.98	£0.12	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.00	£1.37	0.23%	
Zone 4 - North East Huntingdon	Total Zone 4	£0.09	£0.08	£0.02	£0.98	£0.12	£0.00	£0.08	£0.00	£0.00	£0.00	£0.00	£0.00	£1.37	0.23%	
	Other Zone 5	£0.03	£0.00	£0.00	£0.83	£4.76	£0.15	£0.05	£0.03	£0.00	£0.00	£0.04	£0.00	£5.90	0.96%	
	Total Zone 5	£0.03	£0.00	£0.00	£0.83	£4.76	£0.15	£0.05	£0.03	£0.00	£0.00	£0.04	£0.00	£5.90	0.96%	
Zone 6 - South Peterborough	Yaxley Village Centre	£0.08	£0.00	£0.00	£0.00	£0.00	£2.31	£0.00	£0.00	£0.07	£0.00	£0.00	£0.00	£2.45	0.41%	
	Total Zone 6	£0.08	£0.00	£0.00	£0.00	£0.00	£2.31	£0.00	£0.00	£0.07	£0.00	£0.00	£0.00	£2.45	0.41%	
	Sawtry Village Centre	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.62	£0.00	£0.00	£0.00	£0.00	£0.04	£0.66	0.11%	
Zone 7 - Sawtry	Other Zone 7	£0.00	£0.00	£0.00	£0.00	£0.00	£1.32	£0.04	£0.00	£0.00	£0.24	£0.00	£1.60	£3.22	0.52%	
	Total Zone 7	£0.00	£0.00	£0.00	£0.00	£0.00	£1.32	£0.04	£0.00	£0.00	£0.24	£0.00	£1.60	£3.22	0.52%	
	Other Zone 8	£0.13	£0.03	£0.00	£0.00	£0.00	£0.09	£0.00	£0.64	£0.00	£0.26	£0.00	£0.00	£1.14	0.19%	
Zone 8 - West Huntingdon	Total Zone 8	£0.13	£0.03	£0.00	£0.00	£0.00	£0.09	£0.00	£0.64	£0.00	£0.26	£0.00	£0.00	£1.14	0.19%	
	Other Zone 9	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.10	£0.21	0.03%	
	Total Zone 9	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.10	£0.21	0.03%	
Zone 10 - St Neots	St Neots Town Centre	£0.44	£0.24	£0.11	£0.36	£0.05	£0.00	£4.06	£0.43	£14.88	£37.78	£3.86	£0.13	£62.35	10.39%	
	B&Q Eaton Socon, St Neots	£0.09	£0.11	£0.04	£0.13	£0.02	£0.00	£0.62	£0.16	£2.73	£6.32	£1.03	£0.07	£11.31	1.88%	
	Other St Neots	£0.03	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.30	£0.71	£0.03	£0.00	£1.07	0.16%
	Total Zone 10	£0.55	£0.35	£0.15	£0.49	£0.07	£0.00	£4.67	£0.60	£17.91	£44.83	£4.93	£0.20	£74.73	12.43%	
Zone 11 - North Bedford	Other Zone 11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	0.01%	
	Total Zone 11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£0.00	£0.03	0.01%	
	Other Zone 12	£0.00	£0.02	£0.00	£0.02	£0.06	£0.00	£0.06	£0.00	£0.00	£0.08	£0.00	£1.03	£1.28	0.21%	
Zone 12 - North-west Cambridge	Total Zone 12	£0.00	£0.02	£0.00	£0.02	£0.06	£0.00	£0.06	£0.00	£0.00	£0.08	£0.00	£1.03	£1.28	0.21%	
	Total Overall Catchment Area	£44.12	£25.64	£38.19	£38.25	£16.08	£3.55	£21.38	£16.16	£38.81	£51.02	£5.59	£10.53	£299.33	49.87%	
	Peterborough City Centre	£8.39	£4.08	£5.11	£7.73	£12.15	£27.03	£13.59	£6.56	£4.97	£3.63	£0.24	£0.54	£94.02	15.67%	
Buffer 1 - Peterborough	Serpentine Green Shopping Centre, Peterborough	£0.26	£0.00	£0.00	£0.12	£0.61	£7.77	£1.56	£0.00	£0.07	£0.00	£0.15	£10.54	£17.65	3.16%	
	Bouques Retail Park, Peterborough	£0.31	£0.00	£0.05	£0.15	£0.35	£1.71	£0.64	£0.09	£0.00	£0.00	£0.00	£3.29	£5.55	0.95%	
	The Boulevard Retail Park, Peterborough	£0.18	£0.00	£0.00	£0.25	£0.27	£2.29	£0.61	£0.05	£0.04	£0.00	£0.00	£3.68	£6.61%		
	Brotherhood Retail Park, Peterborough	£0.05	£0.06	£0.04	£0.08	£0.00	£1.39	£0.27	£0.11	£0.00	£0.03	£0.00	£0.00	£2.04	0.34%	
Buffer 2 - Fenland	Other Buffer 1	£0.22	£0.14	£0.13	£0.29	£0.82	£2.62	£0.39	£0.20	£0.10	£0.27	£0.00	£0.21	£5.59	0.93%	
	Total Buffer 1	£0.40	£0.28	£0.32	£0.62	£1.60	£4.01	£17.07	£1.01	£5.18	£1.93	£0.24	£0.91	£19.17	3.34%	
	Other Buffer 2	£0.07	£0.00	£0.00	£0.12	£0.16	£0.00	£0.04	£0.04	£0.00	£0.00	£0.00	£0.00	£0.43	0.07%	
	Total Buffer 2	£0.07	£0.00	£0.00	£0.12	£0.16	£0.00	£0.04	£0.04	£0.00	£0.00	£0.00	£0.00	£0.43	0.07%	
Buffer 3 - Cambridge	Cambridge City Centre	£4.69	£10.04	£13.83	£7.69	£1.12	£0.10	£1.24	£1.71	£4.38	£5.62	£0.99	£24.80	£76.22	12.70%	
	Cambridge Retail Park	£0.31	£0.20	£0.26	£0.49	£0.00	£0.00	£0.04	£0.19	£0.37	£0.05	£5.77	£2.67	£4.26	0.73%	
	Other Buffer 3	£0.51	£0.17	£0.75	£1.01	£0.07	£0.00	£0.29	£0.00	£0.10	£0.19	£0.08	£1.93	£5.11	0.85%	
	Total Buffer 3	£5.51	£10.41	£14.84	£9.20	£1.19	£0.10	£1.53	£1.75	£4.67	£6.18	£1.11	£32.50	£88.99	14.83%	
Buffer 4 - North-east Bedfordshire	Biggleswade Town Centre	£0.02	£0.00	£0.00	£0.17	£0.00	£0.00	£0.25	£0.00	£0.36	£1.06	£1.21	£0.00	£3.07	0.51%	
	Other Buffer 4	£0.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.32	£0.86	£0.59	£0.06	£1.99	£0.32%		
	Total Buffer 4	£0.17	£0.00	£0.00	£0.17	£0.00	£0.00	£0.25	£0.00	£0.68	£1.92	£1.80	£0.06	£5.05	0.84%	
	Bedford Town Centre	£0.37	£0.38	£0.10	£0.12	£0.10	£0.06	£0.40	£0.44	£3.23	£9.09	£13.98	£0.26	£28.71	4.78%	
Buffer 5 - Bedford	Interchange Retail Park, Kempston, Bedford	£0.35	£0.05	£0.00	£0.12	£0.00	£0.00	£0.51	£0.06	£1.67	£3.83	£4.56	£0.22	£11.36	1.89%	
	St Johns Centre (including Homebase), Rope Walk, Bedford	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.42	£1.33	£0.06	£1.79	£0.30%		
	Other Buffer 5	£0.13	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£0.00	£0.41	£1.54	£2.44	£0.15	£4.74	0.79%	
	Total Buffer 5	£0.85	£0.42	£0.10	£0.24	£0.10	£0.06	£1.19	£0.50	£5.30	£14.88	£22.31	£0.67	£46.61	7.77%	
Buffer 6 - Thrapston and Raunds	Other Buffer 6	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.01%	
	Total Buffer 6	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	0.01%	
	Other Buffer 7	£0.00	£0.11	£0.00	£0.00	£0.00	£0.34	£0.20	£0.13	£0.00	£0.00	£0.00	£0.07	£0.85	0.14%	
Buffer 7 - East Northamptonshire	Total Buffer 7	£0.00	£0.11	£0.00	£0.00	£0.00	£0.34	£0.20	£0.13	£0.00	£0.00	£0.00	£0.07	£0.85	0.14%	
	Total Buffer Zones	£16.00	£15.23	£20.26	£18.36	£15.64	£43.51	£20.35	£9.43	£15.83	£26.91	£25.46	£34.21	£261.17	43.51%	
	Milton Keynes Town Centre	£0.71	£0.28	£0.29	£0.37	£0.12	£0.57	£0.58	£0.52	£1.05	£2.34	£3.35	£0.16	£10.34	1.72%	
Outside Overall Catchment Area and Buffers	London City Centre	£0.36	£0.40	£0.35	£0.41	£0.05	£0.18	£0.40	£0.47	£0.63	£0.40	£0.38	£0.17	£4.29	0.71%	
	EU City Centre	£0.00	£0.03	£0.00	£0.97	£0.06	£0.00	£0.00	£0.07	£0.00	£0.00	£0.00	£1.93	£3.32%		
	Other Outside Catchment Area and Buffers	£1.47	£2.10	£1.05	£2.32	£1.02	£2.54	£2.54	£1.25	£1.30	£2.85	£1.44	£3.16	£23.14	3.86%	
	Total Outside Catchment Area and Buffers	£2.54	£2.80	£1.69	£4.07	£1.24	£3.30	£3.52	£2.31	£3.08	£5.68	£5.18	£4.30	£39.70	6.62%	
Overall Total		£62.7	£43.7	£60.1	£60.7	£33.0	£50.4	£45.2	£27.9	£47.7	£83.6	£36.2	£49.0	£600.2	100.0%	

Notes:

1. 2011 Prices
2. Flows of expenditure calculated by multiplying market shares from Table 6 by Total Available Expenditure within each zone from Table 5
3. Market share of facility calculated by dividing expenditure spent at facility from residents of OCA by total available comparison goods expenditure within OCA

£228.37

Huntingdonshire District Council  
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**Table 8 - Retention Rates of Overall Catchment Area Study Zones in 2013**

Zone	Total Available Comparison Goods Expenditure Within Zone in 2013 (£m)	Expenditure Spent Within 'Home' Zone From Residents of that Zone in 2013 (£m)	Individual Zone's Retention Rate (%)
Zone 1 - Huntingdon Town Centre	£62.65	£41.93	66.93%
Zone 2 - South East Huntingdon	£43.68	£1.10	2.52%
Zone 3 - St Ives	£60.14	£21.24	35.31%
Zone 4 - North East Huntingdon	£60.68	£0.98	1.62%
Zone 5 - Ramsey	£32.96	£4.76	14.44%
Zone 6 - South Peterborough	£50.36	£2.31	4.58%
Zone 7 - Sawtry	£45.25	£1.94	4.28%
Zone 8 - West Huntingdon	£27.90	£0.64	2.28%
Zone 9 - South Huntingdon	£47.71	£0.10	0.22%
Zone 10 - St Neots	£83.59	£44.81	53.61%
Zone 11 - North Bedford	£36.23	£0.03	0.09%
Zone 12 - North-west Cambridge	£49.04	£1.03	2.10%
Total Overall Catchment Area	£600.19	£299.33	49.87%

Notes

1. 2011 prices
2. Retention rate calculated by dividing expenditure spent within each zone by residents of that zone from Table 7 by total available comparison goods expenditure from Table 5

Huntingdonshire District Council  
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Table 9a - Benchmark Comparison Goods Turnover of Existing Foodstores Within Overall Catchment Area

Zone	Facility	Gross Floorspace (sq. m)	Net Sales Floorspace (sq. m)	Proportion of Comparison Goods Floorspace (%)	Net Comparison Goods Sales Area (sq. m)	Turnover per sq. m (£) 2013	Turnover (£m) 2013	Turnover (£m) 2014	Turnover (£m) 2015	Turnover (£m) 2016	Turnover (£m) 2021	Turnover (£m) 2026	Turnover (£m) 2031
Zone 1 - Huntingdon Town Centre	Tesco Express, Wertheim Way, Huntingdon, PE29 6UQ	245	148	10%	15	£13,160	£0.19	£0.20	£0.20	£0.21	£0.23	£0.25	£0.27
	Sainsbury's, St. Germain Walk, Huntingdon, PE29 3FG	4,528	3,224	30%	974	£5,521	£5.38	£5.49	£5.60	£5.72	£6.31	£6.90	£7.54
	Waitrose, Prince's Street, Huntingdon, PE29 3PR	-	1,195	19%	224	£6,244	£1.40	£1.43	£1.46	£1.49	£1.64	£1.80	£1.96
	Iceland, High Street, Huntingdon, PE29 3LD	-	476	3%	14	£8,515	£0.12	£0.12	£0.13	£0.13	£0.14	£0.15	£0.17
Zone 2 - South East Huntingdon	Co-op, Cambridge Road, Godmanchester, PE29 2BT	-	228	16%	37	£6,414	£0.24	£0.24	£0.25	£0.25	£0.28	£0.31	£0.34
	One Stop, 18 The Causeway, Godmanchester, PE29 2HA	-	151	10%	15	£6,538	£0.10	£0.10	£0.10	£0.11	£0.12	£0.13	£0.14
Zone 3 - St Ives	Waitrose, Station Road, St Ives, PE27 5AN	-	1,394	19%	262	£6,244	£1.63	£1.67	£1.70	£1.74	£1.92	£2.10	£2.29
	Co-op, Constable Road, St Ives, PE27 3ER	2,601	1,356	16%	222	£6,414	£1.42	£1.45	£1.49	£1.52	£1.67	£1.83	£2.00
	One Stop, 2 Townsend Road, Needingworth, PE27 4SE	-	134	10%	13	£6,538	£0.09	£0.09	£0.09	£0.09	£0.10	£0.11	£0.12
Zone 4 - North East Huntingdon	Tesco Extra, Abbots Ripton Road, Huntingdon, PE28 2LA	9,407	4,852	28%	1,341	£10,791	£14.47	£14.77	£15.08	£15.40	£16.98	£18.57	£20.30
	Tesco Express, 89 High Street, Somersham, PE28 3EE	-	150	10%	15	£13,160	£0.20	£0.20	£0.21	£0.21	£0.23	£0.25	£0.28
	One Stop, 101 High Street, Somersham, PE28 3EE	-	134	10%	13	£6,538	£0.09	£0.09	£0.09	£0.09	£0.10	£0.11	£0.12
Zone 5 - Ramsey	Co-op, Newtown Road, Ramsey, PE26 1EJ	-	1,579	16%	259	£6,414	£1.66	£1.69	£1.73	£1.77	£1.95	£2.13	£2.33
Zone 6 - South Peterborough	Co-op, Bentley Avenue, Yaxley, PE7 3ZT	-	1,115	16%	183	£6,414	£1.17	£1.20	£1.22	£1.25	£1.38	£1.50	£1.64
Zone 7 - Sawtry	Co-op, Green End Road, Sawtry, PE28 5UX	-	166	16%	27	£6,414	£0.17	£0.18	£0.18	£0.19	£0.20	£0.22	£0.24
Zone 8 - West Huntingdon	Co-op, High Street, Brampton, PE28 4TO	-	145	16%	24	£6,414	£0.15	£0.16	£0.16	£0.16	£0.18	£0.20	£0.21
Zone 9 - South Huntingdon	One Stop, 36-38 High Street, Buckden, PE19 5XP	-	134	10%	13	£6,538	£0.09	£0.09	£0.09	£0.09	£0.10	£0.11	£0.12
Zone 10 - St Neots	Tesco Extra, Barford Road, St Neots, PE19 2SA	6,100	3,372	28%	932	£10,791	£10.05	£10.26	£10.48	£10.70	£11.80	£12.90	£14.11
	Tesco Express, Great North Road, Eaton Socon, PE19 8EQ	358	254	10%	25	£13,160	£0.33	£0.34	£0.35	£0.36	£0.39	£0.43	£0.47
	Waitrose, Priory Lane, St Neots, PE19 2BH	-	1,273	19%	239	£6,244	£1.49	£1.52	£1.55	£1.59	£1.75	£1.91	£2.09
	Co-op, Tebbutts Road, St Neots, PE19 1AW	2,217	1,151	16%	189	£6,414	£1.21	£1.23	£1.26	£1.29	£1.42	£1.55	£1.70
	Co-op, Old Great North Road, Eaton Socon, PE19 8FT	-	920	16%	151	£6,414	£0.97	£0.99	£1.01	£1.03	£1.13	£1.24	£1.36
	LIDL, Cambridge Street, St Neots, PE19 1JL	-	929	27%	250	£1,542	£0.39	£0.39	£0.40	£0.41	£0.45	£0.50	£0.54
	Iceland, Market Square, St Neots, PE19 2AR	-	418	3%	12	£8,515	£0.11	£0.11	£0.11	£0.11	£0.12	£0.14	£0.15
	One Stop, Berkeley Street, St Neots, PE19 2ND	-	139	10%	14	£6,538	£0.09	£0.09	£0.09	£0.10	£0.11	£0.12	£0.13
	One Stop, 29 St Neots Road, Eaton Ford, PE19 7BA	-	134	10%	13	£6,538	£0.09	£0.09	£0.09	£0.09	£0.10	£0.11	£0.12
	M&S Simply Food, High Street, St Neots, PE19 1BN	1,203	492	5%	26	£6,558	£0.17	£0.18	£0.18	£0.18	£0.20	£0.22	£0.24
Zone 12 - North-west Cambridge	Co-op, High Street, Willingham, CB24 5ES	368	225	16%	37	£6,414	£0.24	£0.24	£0.25	£0.25	£0.28	£0.30	£0.33
	One Stop, 56-58 Church Street, Willingham	-	133	10%	13	£6,538	£0.09	£0.09	£0.09	£0.09	£0.10	£0.11	£0.12
Total Overall Catchment Area		-	26,021	-	5,553	-	£43.79	£44.71	£45.65	£46.61	£51.41	£56.20	£61.45

Notes

- 2011 prices
- Gross and net floorspace details for each facility taken from IGD foodstore database 2010 unless otherwise specified
- Proportion of comparison goods floorspace and turnover per sq. m derived from Verdict Food and Grocery Retailing in the UK 2012 and Mintel Retail Rankings 2012 unless otherwise specified
- Turnovers projected utilising Experian forecast sales densities taken from Figure 4b, page 14 of Experian Retail Planner Briefing Note 10.1, September 2012 (Yearly percentage growth rates utilised - 2011: 0.8%, 2012: 1.5%, 2013: 1.2%, 2014-19: 2.1% and 2020-36: 1.8%)
- No published sales density growth rates available for years post 2029 so growth assumed to remain constant over years following this period at 1.8% per annum 2029 level
- Tesco Express and One Stop stores assumed to have 10% of net floorspace utilised for the sale of comparison goods
- Net floorspace of Tesco Ramsey provided by Huntingdonshire District Council

Table 9b - Comparison Goods Turnover of Main Town Centres Within Overall Catchment Area

Centre	Turnover from catchment in 2013 (£m)	Gross Comparison Goods Floorspace (sq. m)	Net Comparison Goods Floorspace (sq. m)	Survey-derived Turnover per sq. m (£)
Huntingdon Town Centre	£122.66	18,190	12,733	£9,633
St Neots Town Centre	£62.35	14,028	9,820	£6,349
St Ives Town Centre	£43.36	12,876	9,013	£4,810

Notes

- 2011 prices
- Gross comparison goods floorspace figures taken from GOAD Centres Database, gross figures converted to net utilising a 70% gross to net ratio

Table 10a - Estimated Comparison Goods Turnover of Commitments Within Overall Catchment Area

Zone	Commitment	Application Reference	Gross Floorspace (sq. m)	Net Sales Floorspace (sq. m)	Proportion of Comparison Goods Floorspace (%)	Net Comparison Goods Sales Area (sq. m)	Turnover per sq. m (£) 2013	Turnover (£m) 2013	Turnover (£m) 2014	Turnover (£m) 2015	Turnover (£m) 2016	Turnover (£m) 2021	Turnover (£m) 2026	Turnover (£m) 2031
Zone 1 - Huntingdon Town Centre	Chequers Court Foodstore	1100979FUL	1,999	1,395	30%	421	£5.521	£2.33	£2.37	£2.42	£2.48	£2.73	£2.99	£3.26
	Chequers Court Additional Retail Units		2,685	2,014	65%	1,309	£4.109	£5.38	£5.49	£5.61	£5.72	£6.31	£6.90	£7.55
	Existing Sainsburys Sub-division	10017510UT	4,528	3,396	80%	2,717	£4.109	£11.16	£11.40	£11.64	£11.88	£13.10	£14.33	£15.66
	Chequers Court / Germain Walk Major Store Unit		4,355	3,700	100%	3,700	£4.109	£15.20	£15.52	£15.85	£16.18	£17.85	£19.51	£21.33
	Loss of Existing Sainsburys Store		-4,528	-3,224	30%	-974	£5.521	£5.38	£5.49	£5.60	£5.72	£6.31	£6.90	£7.54
Zone 2 - South East	Co-op, Cambridge Road, Godmanchester, PE29 2BT	0701280FUL	408	230	16%	38	£6.414	£0.24	£0.25	£0.25	£0.26	£0.28	£0.31	£0.34
Zone 5 - Ramsey	Tesco, Neil Way, Ramsey, PE26 2SB	0900192REM	3,160	2,316	15%	347	£10.791	£3.75	£3.83	£3.91	£3.99	£4.40	£4.81	£5.26
Zone 8 - West Huntingdon	Sainsburys Brampton Road Replacement Store	1001751FUL	9,456	5,275	32%	1,688	£5.521	£9.32	£9.52	£9.72	£9.92	£10.94	£11.96	£13.08
	Brampton Road Additional Retail Units	1001751FUL	1,094	821	50%	410	£3.082	£1.26	£1.29	£1.32	£1.35	£1.48	£1.62	£1.77
Zone 10 - St Neots	Station Square at Loves Farm Tesco Express	1101368OUT	410	308	10%	31	£13.160	£0.40	£0.41	£0.42	£0.43	£0.48	£0.52	£0.57
	Station Square at Loves Farm Additional Retail Units		372	279	50%	140	£3.082	£0.43	£0.44	£0.45	£0.46	£0.50	£0.55	£0.60
Total Overall Catchment Area			-	-	-	9,827	-	£44.10	£45.03	£45.97	£46.94	£51.77	£56.60	£61.88

Notes

- 2011 prices
- Gross and net floorspace details for each Commitment provided by Huntingdonshire District Council unless otherwise specified
- Proportion of comparison goods floorspace and turnover per sq. m derived from Verdict Food and Grocery Retailing in the UK 2012 and Mintel Retail Rankings 2012 unless otherwise specified
- Turnovers projected utilising Experian forecast sales densities taken from Figure 4b, page 14 of Experian Retail Planner Briefing Note 10.1, September 2012 (Yearly percentage growth rates utilised - 2011: 0.8%, 2012: 1.5%, 2013: 1.2%, 2014-19: 2.1% and 2020-36: 1.8%)
- No published sales density growth rates available for years post 2029 so growth assumed to remain constant over years following this period at 1.8% per annum 2029 level
- Assumed Chequers Court additional retail units have a gross to net ratio of 75% and 65% of available floorspace is utilised for the sale of comparison goods with turnover per sq. m of £4,000 (2010)
- Assumed Chequers Court foodstore occupied by a 'Top Five' retailer (Tesco, ASDA, Sainsburys, Morrisons or Waitrose) and average proportion of comparison goods floorspace and turnover per sq. m utilised for these retailers
- Gross floorspace of existing Sainsburys store Huntingdon taken from IGD foodstore database, assumed sub-divided using a 75% gross to net ratio and that 80% of new retail units would be used for the sale of comparison goods with a turnover per sq. m of £4,000 per sq. m in 2011 as a Deloitte estimate
- Chequers Court / Germain Walk Major Store Unit floorspace taken from page 9 of Indigo Planning Statement, net floorspace provided within Huntingdonshire Council letter of 25 October 2012 and that occupied by a comparison goods retailer with a turnover per sq. m of £4,000 per sq. m as a Deloitte estimate
- Loss of existing Sainsburys store based upon proportion of comparison goods floorspace and turnover per sq. m derived from Verdict Food and Grocery Retailers 2011
- Floorspace details for Sainsburys Brampton Road replacement store taken from Indigo letter of 7 December 2012 and turnover per sq. m Sainsburys company average derived from Verdict Food and Grocery Retailing in the UK 2012
- Gross floorspace of Brampton Road additional retail units taken from Indigo letter of 7 December 2012, assumed gross to net ratio of 75% and proportion of comparison goods floorspace 50% (25% convenience, 25% services - A2-A5 and A1 services) with a turnover per sq. m of £4,000 per sq. m as a Deloitte estimate
- Station Square at Loves Farm total floorspace taken from Decision Notice and floorspace of Tesco Express taken from Planning Statement. Assumed 75% gross to net ratio and 50% of additional floorspace used for sale of convenience goods and 50% for the sale of comparison goods

Table 10b - Estimated Comparison Goods Turnover of Pipeline Developments Within Overall Catchment Area

Zone	Pipeline Development	Application Reference	Gross Floorspace (sq. m)	Net Sales Floorspace (sq. m)	Proportion of Comparison Goods Floorspace (%)	Net Comparison Goods Sales Area (sq. m)	Turnover per sq. m (£) 2013	Turnover (£m) 2013	Turnover (£m) 2014	Turnover (£m) 2015	Turnover (£m) 2016	Turnover (£m) 2021	Turnover (£m) 2026	Turnover (£m) 2031
Zone 2 - South East Huntingdon	Bearscroft Farm Retail Unit	1200685OUT	857	600	16%	98	£6,414	£0.63	£0.64	£0.66	£0.67	£0.74	£0.81	£0.88
Zone 3 - St Ives	St Ives West Urban Design Framework Proposed Retail Unit	N/A	571	400	16%	66	£6,414	£0.42	£0.43	£0.44	£0.45	£0.49	£0.54	£0.59
Zone 8 - West Huntingdon	RAF Brampton Urban Design Framework Foodstore	N/A	-	228	16%	37	£6,414	£0.24	£0.24	£0.25	£0.28	£0.31	£0.34	
	RAF Brampton Urban Design Framework Additional Units	N/A	429	300	50%	150	£3,082	£0.46	£0.47	£0.48	£0.49	£0.54	£0.59	£0.65
Zone 10 - St Neots	St Neots East Urban Design Framework District Centre Foodstore	N/A	1,429	1,000	20%	200	£7,998	£1.60	£1.63	£1.67	£1.70	£1.88	£2.05	£2.24
	St Neots East Urban Design Framework District Centre Additional Convenience Goods Floorspace		429	300	0%	0	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	St Neots East Urban Design Framework District Centre Comparison Goods Floorspace		429	300	100%	300	£3,082	£0.92	£0.94	£0.96	£0.98	£1.09	£1.19	£1.30
	St Neots East Urban Design Framework Local Centre Comparison Goods Floorspace		286	200	100%	200	£2,568	£0.51	£0.52	£0.54	£0.55	£0.60	£0.66	£0.72
	St Neots East Urban Design Framework Local Centre Convenience Goods Floorspace		143	100	0%	0	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Total Overall Catchment Area			4,571	3,428	-	1,051	-	£4.79	£4.89	£4.99	£5.10	£5.62	£6.15	£6.72

**Notes**

- 2011 prices
- Net floorspace details for each Commitment provided by Huntingdonshire District Council unless otherwise specified, gross floorspace calculated using gross to net ratio of 70%
- Proportion of comparison goods floorspace and turnover per sq. m derived from Verdict Food and Grocery Retailing in the UK 2012 and Mintel Retail Rankings 2012 unless otherwise specified
- Turnovers projected utilising Experian forecast sales densities taken from Figure 4b, page 14 of Experian Retail Planner Briefing Note 10.1, September 2012 (Yearly percentage growth rates utilised - 2011: 0.8%, 2012: 1.5%, 2013: 1.2%, 2014-19: 2.1% and 2020-36: 1.8%)
- No published sales density growth rates available for years post 2029 so growth assumed to remain constant over years following this period at 1.8% per annum 2029 level
- Assumed Bearscroft Farm retail unit has a gross to net ratio of 70% and is occupied by a retailer with the same (or similar) trading characteristics as the Co-op

Table 10c - Estimated Comparison Goods Turnover of Alconbury Proposals

Zone	Alconbury	Application Reference / Source	Gross Floorspace (sq. m)	Net Sales Floorspace (sq. m)	Proportion of Comparison Goods Floorspace (%)	Net Comparison Goods Sales Area (sq. m)	Turnover per sq. m (£) 2013	Turnover (£m) 2013	Turnover (£m) 2014	Turnover (£m) 2015	Turnover (£m) 2016	Turnover (£m) 2021	Turnover (£m) 2026	Turnover (£m) 2031
Zone 8 - West Huntingdon	Alconbury Weald Foodstore	1201158OUT	1,500	1,000	0%	0	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Alconbury Weald Additional Convenience Goods Floorspace		1,000	750	0%	0	£0	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	Alconbury Weald Comparison Goods Floorspace		2,000	1,500	100%	1,500	£3,082	£4.62	£4.72	£4.82	£4.92	£5.43	£5.93	£6.49
	Total		-	3,250	-	1,500	-	£4.62	£4.72	£4.82	£4.92	£5.43	£5.93	£6.49

**Notes**

- 2011 prices
- Gross and net floorspace details for each Commitment obtained from Huntingdonshire District Council unless otherwise specified
- Proportion of comparison goods floorspace and turnover per sq. m derived from Verdict Food and Grocery Retailing in the UK 2012 and Mintel Retail Rankings 2012 unless otherwise specified
- Turnovers projected utilising Experian forecast sales densities taken from Figure 4b, page 14 of Experian Retail Planner Briefing Note 10.1, September 2012 (Yearly percentage growth rates utilised - 2011: 0.8%, 2012: 1.5%, 2013: 1.2%, 2014-19: 2.1% and 2020-36: 1.8%)
- No published sales density growth rates available for years post 2028 so growth assumed to remain constant over this period at 0.2% per annum 2028 level
- Alconbury Weald Foodstore floorspace details obtained from Table 14 of submitted Retail Impact Assessment and occupied by 'Top Five' foodstore operator
- Assumed that of 7,000 sq. m A1-A5 floorspace proposed at Alconbury Weald, 1,500 sq. m is occupied by the proposed foodstore, 2,000 sq. m of comparison goods floorspace and a further 1,000 sq. m of convenience goods floorspace with gross to net ratio of 75%
- Alconbury Weald comparison goods floorspace turnover per sq. m of £3,000 in 2010 Deloitte estimate

Huntingdonshire District Council  
Retail Study 2013 - Comparison Goods Capacity Assessment

Table 11 - Summary of Capacity for Comparison Goods Floorspace - Existing Retention Rate

Equivalent Row From RTP Study	Overall Catchment Area	2013	2014	2015	2016	2021	2026	2031
A	Total Available Comparison Goods Expenditure (€m)	€600.19	€615.13	€633.87	€652.56	€760.43	€910.49	€1,091.26
B	Current Retention Rate of Overall Catchment Area (%)	49.87%	49.87%	49.87%	49.87%	49.87%	49.87%	49.87%
C	Retained Expenditure (€m) [AxB]	€299.33	€306.78	€316.13	€325.45	€379.25	€454.09	€544.24
D	Turnover of Existing Facilities (€m)	€299.33	€305.62	€312.04	€318.59	€351.40	€384.19	€420.03
G	Turnover of Commitments (€m)	€44.10	€45.03	€45.97	€46.94	€51.77	€56.60	€61.88
H	Residual Expenditure Capacity (€m) [C-D-G]	-€44.10	-€43.86	-€41.88	-€40.08	-€23.92	€13.30	€62.33
-	Turnover of Pipeline Developments	€4.79	€4.89	€4.99	€5.10	€5.62	€6.15	€6.72
-	Turnover per sq. m (€)	€5,000	€5,105	€5,212	€5,322	€5,870	€6,417	€7,016
I	Net Floorspace Equivalent (sq. m)	-8,820	-8,592	-8,035	-7,531	-4,076	2,072	8,883
J	Gross Floorspace Equivalent (sq. m)	-11,761	-11,456	-10,713	-10,041	-5,434	2,763	11,845

Notes

- 2011 prices
- No row E as per RTP Study as increase in turnover of existing facilities over time built into figures within row D. RTP Study does not contain a row F
- Total available comparison goods expenditure obtained from Table 5, current retention rate obtained from Table 8, turnover of existing facilities from Table 7 and turnover of Commitments from Table 9
- Turnovers of existing facilities and Commitments projected utilising Experian forecast sales densities taken from Figure 4b, page 14 of Experian Retail Planner Briefing Note 10.1, September 2012 (Yearly percentage growth rates utilised - 2011: 0.8%, 20 12: 1.5%, 2013: 1.2%, 2014-19: 2.1% and 2020-36: 1.8%)
- No published sales density growth rates available for years post 2029 so growth assumed to remain constant over this period at 1.8% per annum 2029 level
- Net floorspace equivalent for calculated using turnover per sq. m of €5,000 as consistent with RTP Study
- Gross floorspace equivalent assumes a gross to net ratio of 75%
- Turnover of pipeline developments taken from Table 10b and includes retail proposals for which there is specific policy support for a particular quantum of retail floorspace - floorspace equivalent capacity figures do not take into account the turnover of pipeline developments
- All floorspace figures are indicative and the 'capacity' for a particular proposal will depend upon the specific net sales area and turnover per sq. m of any relevant comparison goods proposal

Table 12 - Summary of Capacity for Comparison Goods Floorspace - Increase in Retention Rate to 55% by 2021

Equivalent Row From RTP Study	Overall Catchment Area	2013	2014	2015	2016	2021	2026	2031
A	Total Available Comparison Goods Expenditure (€m)	€600.19	€615.13	€633.87	€652.56	€760.43	€910.49	€1,091.26
B	Current Retention Rate of Overall Catchment Area (%)	51.00%	51.00%	52.00%	52.00%	55.00%	55.00%	55.00%
C	Retained Expenditure (€m) [AxB]	€306.10	€313.72	€329.61	€339.33	€418.24	€500.77	€600.19
D	Turnover of Existing Facilities (€m)	€299.33	€305.62	€312.04	€318.59	€351.40	€384.19	€420.03
G	Turnover of Commitments (€m)	€44.10	€45.03	€45.97	€46.94	€51.77	€56.60	€61.88
H	Residual Expenditure Capacity (€m) [C-D-G]	-€37.34	-€36.93	-€28.40	-€26.20	€15.06	€59.98	€118.28
-	Turnover of Pipeline Developments	€4.79	€4.89	€4.99	€5.10	€5.62	€6.15	€6.72
-	Turnover per sq. m (€)	€5,000	€5,020	€5,040	€5,060	€5,131	€5,183	€5,235
I	Net Floorspace Equivalent (sq. m)	-7,468	-7,357	-6,834	-6,177	2,936	11,572	22,593
J	Gross Floorspace Equivalent (sq. m)	-9,957	-9,809	-9,113	-8,903	3,914	15,430	30,124

Notes

- 2011 prices
- No row E as per RTP Study as increase in turnover of existing facilities over time built into figures within row D. RTP Study does not contain a row F
- Total available comparison goods expenditure obtained from Table 5, current retention rate obtained from Table 8, turnover of existing facilities from Table 7 and turnover of Commitments from Table 9
- Turnovers of existing facilities and Commitments projected utilising Experian forecast sales densities taken from Figure 4b, page 14 of Experian Retail Planner Briefing Note 10.1, September 2012 (Yearly percentage growth rates utilised - 2011: 0.8%, 20 12: 1.5%, 2013: 1.2%, 2014-19: 2.1% and 2020-36: 1.8%)
- No published sales density growth rates available for years post 2029 so growth assumed to remain constant over this period at 1.8% per annum 2029 level
- Net floorspace equivalent for calculated using turnover per sq. m of €5,000 as consistent with RTP Study
- Gross floorspace equivalent assumes a gross to net ratio of 75%
- Retention rate increased from 2012 base at a rate of 1% every 2 years up to 55% in 2021 following which the rate remains constant
- Turnover of pipeline developments taken from Table 10b and includes retail proposals for which there is specific policy support for a particular quantum of retail floorspace - floorspace equivalent capacity figures do not take into account the turnover of pipeline developments
- All floorspace figures are indicative and the 'capacity' for a particular proposal will depend upon the specific net sales area and turnover per sq. m of any relevant comparison goods proposal





## Appendix 5 - Housing Allocations Analysis

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**Job title:**

Huntingdonshire Retail Study 2013

**Client:**

Huntingdonshire District Council

**Date:**

April 2013

Huntingdonshire District Council  
Retail Study 2013 - Housing Allocations Analysis

Table 1 - Additional Population Created by Housing Growth - Policy Options - Alconbury

Alconbury - Zone 8		Number of New Households Proposed	Estimated Average Household Size of Zone in 2036	Additional Population Created by 2036	Expenditure per Head Minus NSRT in 2036 (£m)	Additional Expenditure Created (£m)	Potential Retention Rate (%)	Expenditure to Support Floorspace (£m)	Turnover Per sq. m of New Floorspace (£)	Net Floorspace Equivalent (sq. m)	Gross Floorspace Equivalent (sq. m)
Convenience Goods	Medium Retention	5,000	2.27	11,350	£2,234	£25.36	50%	£12.68	£14,298	887	1,364
	High Retention	5,000	2.27	11,350	£2,234	£25.36	75%	£19.02	£14,298	1,330	2,046
Comparison Goods		5,000	2.27	11,350	£5,747	£65.23	20%	£13.05	£7,671	1,701	2,126

Notes

- 2011 prices
- Housing growth figures provided by Huntingdonshire District Council in March 2013
- Average Household size of zone in 2036 derived from East of England population projections data
- Expenditure per head in 2036 minus NRST adjustment taken from Table 3 of convenience and comparison goods capacity assessments
- Potential retention rate Deloitte estimate
- Turnover per sq. m in 2036 taken from Table 11 of convenience and comparison goods capacity assessments - convenience turnover based on average of 'Top Five' foodstores - Tesco, ASDA, Sainsburys, Morrisons and Waitrose
- Gross to net ratio of convenience goods floorspace 65%, comparison goods floorspace 80%

Table 2 - Additional Population Created by Housing Growth - Policy Options - Bearscroft Farm, Godmanchester

Bearscroft Farm - Zone 2		Number of New Households Proposed	Estimated Average Household Size of Zone in 2036	Additional Population Created by 2036	Expenditure per Head Minus NSRT in 2036 (£m)	Additional Expenditure Created (£m)	Potential Retention Rate (%)	Expenditure to Support Floorspace (£m)	Turnover Per sq. m of New Floorspace (£)	Net Floorspace Equivalent (sq. m)	Gross Floorspace Equivalent (sq. m)
Convenience Goods		750	2.27	1,703	£2,310	£3.93	50%	£1.97	£10,000	197	303
Comparison Goods		750	2.27	1,703	£5,897	£10.04	20%	£2.01	£6,000	335	418

Notes

- 2011 prices
- Housing growth figures provided by Huntingdonshire District Council in March 2013
- Average Household size of zone in 2036 derived from East of England population projections data
- Expenditure per head in 2036 minus NRST adjustment taken from Table 3 of convenience and comparison goods capacity assessments
- Potential retention rate Deloitte estimate
- Turnover per sq. m in 2036 Deloitte Real Estate estimate based upon Table 11 of convenience and comparison goods capacity assessments - assumed turnover per sq. m lower than national averages due to small settlement size
- Gross to net ratio of convenience goods floorspace 65%, comparison goods floorspace 80%

Huntingdonshire District Council  
Retail Study 2013 - Housing Allocations Analysis

**Table 3 - Additional Population Created by Housing Growth - Policy Options - RAF Brampton**

Brampton - Zone 8	Number of New Households Proposed	Estimated Average Household Size of Zone in 2036	Additional Population Created by 2036	Expenditure per Head Minus NSRT in 2036 (£m)	Additional Expenditure Created (£m)	Potential Retention Rate (%)	Expenditure to Support Floorspace (£m)	Turnover Per sq. m of New Floorspace (£)	Net Floorspace Equivalent (sq. m)	Gross Floorspace Equivalent (sq. m)
Convenience Goods	400	2.27	908	£2,234	£2.03	50%	£1.01	£10,000	101	156
Comparison Goods	400	2.27	908	£5,747	£5.22	20%	£1.04	£6,000	174	217

**Notes**

1. 2011 prices
2. Housing growth figures provided by Huntingdonshire District Council in March 2013
3. Average Household size of zone in 2036 derived from East of England population projections data
4. Expenditure per head in 2036 minus NRST adjustment taken from Table 3 of convenience and comparison goods capacity assessments
5. Potential retention rate Deloitte estimate
6. Turnover per sq. m in 2036 Deloitte Real Estate estimate based upon Table 11 of convenience and comparison goods capacity assessments - assumed turnover per sq. m lower than national averages due to small settlement size
7. Gross to net ratio of convenience goods floorspace 65%, comparison goods floorspace 80%

**Table 4 - Additional Population Created by Housing Growth - Policy Options - Land South of Ermine Street, Huntingdon**

Land South of Ermine Street - Zone 8	Number of New Households Proposed	Estimated Average Household Size of Zone in 2036	Additional Population Created by 2036	Expenditure per Head Minus NSRT in 2036 (£m)	Additional Expenditure Created (£m)	Potential Retention Rate (%)	Expenditure to Support Floorspace (£m)	Turnover Per sq. m of New Floorspace (£)	Net Floorspace Equivalent (sq. m)	Gross Floorspace Equivalent (sq. m)
Convenience Goods	1,050	2.27	2,384	£2,234	£5.32	50%	£2.66	£10,000	266	410
Comparison Goods	1,050	2.27	2,384	£5,747	£13.70	20%	£2.74	£6,000	457	571

**Notes**

1. 2011 prices
2. Housing growth figures provided by Huntingdonshire District Council in March 2013
3. Average Household size of zone in 2036 derived from East of England population projections data
4. Expenditure per head in 2036 minus NRST adjustment taken from Table 3 of convenience and comparison goods capacity assessments
5. Potential retention rate Deloitte estimate
6. Turnover per sq. m in 2036 Deloitte Real Estate estimate based upon Table 11 of convenience and comparison goods capacity assessments - assumed turnover per sq. m lower than national averages due to small settlement size
7. Gross to net ratio of convenience goods floorspace 65%, comparison goods floorspace 80%

Huntingdonshire District Council  
Retail Study 2013 - Housing Allocations Analysis

**Table 5 - Additional Population Created by Housing Growth - Policy Options - St Neots East**

St Neots East - Zone 10	Number of New Households Proposed	Estimated Average Household Size of Zone in 2036	Additional Population Created by 2036	Expenditure per Head Minus NSRT in 2036 (£m)	Additional Expenditure Created (£m)	Potential Retention Rate (%)	Expenditure to Support Floorspace (£m)	Turnover Per sq. m of New Floorspace (£)	Net Floorspace Equivalent (sq. m)	Gross Floorspace Equivalent (sq. m)
Convenience Goods	3,730	2.27	8,467	£2,146	£18.17	50%	£9.09	£12,500	727	1,118
Comparison Goods	3,730	2.27	8,467	£5,096	£43.15	20%	£8.63	£6,500	1,328	1,660

**Notes**

1. 2011 prices
2. Housing growth figures provided by Huntingdonshire District Council in March 2013
3. Average Household size of zone in 2036 derived from East of England population projections data
4. Expenditure per head in 2036 minus NRST adjustment taken from Table 3 of convenience and comparison goods capacity assessments
5. Potential retention rate Deloitte estimate
6. Turnover per sq. m in 2036 Deloitte Real Estate estimate based upon Table 11 of convenience and comparison goods capacity assessments - assumed turnover per sq. m lower than national averages due to concentration of population in St Neots to the East of the East Coast Mainline
7. Gross to net ratio of convenience goods floorspace 65%, comparison goods floorspace 80%

**Table 6 - Additional Population Created by Housing Growth - Policy Options - St Ives West**

St Ives West - Zone 3	Number of New Households Proposed	Estimated Average Household Size of Zone in 2036	Additional Population Created by 2036	Expenditure per Head Minus NSRT in 2036 (£m)	Additional Expenditure Created (£m)	Potential Retention Rate (%)	Expenditure to Support Floorspace (£m)	Turnover Per sq. m of New Floorspace (£)	Net Floorspace Equivalent (sq. m)	Gross Floorspace Equivalent (sq. m)
Convenience Goods	500	2.27	1,135	£2,148	£2.44	50%	£1.22	£10,000	122	188
Comparison Goods	500	2.27	1,135	£5,281	£5.99	20%	£1.20	£6,000	200	250

**Notes**

1. 2011 prices
2. Housing growth figures provided by Huntingdonshire District Council in March 2013
3. Average Household size of zone in 2036 derived from East of England population projections data
4. Expenditure per head in 2036 minus NRST adjustment taken from Table 3 of convenience and comparison goods capacity assessments
5. Potential retention rate Deloitte estimate
6. Turnover per sq. m in 2036 Deloitte Real Estate estimate based upon Table 11 of convenience and comparison goods capacity assessments - assumed turnover per sq. m lower than national averages due to small settlement size
7. Gross to net ratio of convenience goods floorspace 65%, comparison goods floorspace 80%

Huntingdonshire District Council  
Retail Study 2013 - Housing Allocations Analysis

Table 7 - Additional Population Created by Housing Growth - Policy Options - Wyton-on-the-Hill

Wyton - Zone 4	Number of New Households Proposed	Estimated Average Household Size of Zone in 2036	Additional Population Created by 2036	Expenditure per Head Minus NSRT in 2036 (£m)	Additional Expenditure Created (£m)	Potential Retention Rate (%)	Expenditure to Support Floorspace (£m)	Turnover Per sq. m of New Floorspace (£)	Net Floorspace Equivalent (sq. m)	Gross Floorspace Equivalent (sq. m)
Convenience Goods	3,750	2.27	8,513	£2,246	£19.12	50%	£9.56	£12,500	765	1,177
Comparison Goods	3,750	2.27	8,513	£5,779	£49.19	20%	£9.84	£6,500	1,514	1,892

Notes

1. 2011 prices
2. Housing growth figures provided by Huntingdonshire District Council in March 2013
3. Average Household size of zone in 2036 derived from East of England population projections data
4. Expenditure per head in 2036 minus NRST adjustment taken from Table 3 of convenience and comparison goods capacity assessments
5. Potential retention rate Deloitte estimate
6. Turnover per sq. m in 2036 Deloitte Real Estate estimate based upon Table 11 of convenience and comparison goods capacity assessments - assumed turnover per sq. m lower than national averages due to small settlement size
7. Gross to net ratio of convenience goods floorspace 65%, comparison goods floorspace 80%

*Huntingdonshire Local Plan to 2036  
Background Paper*

## **Retail Provision in Huntingdonshire**

**April 2013**

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## **1. Introduction**

- 1.1 This paper is a technical document which outlines how Huntingdonshire District Council has considered retail issues for its Stage 3 Draft Local Plan consultation.
- 1.2 There are three main reasons why a new Local Plan to 2036 is needed in Huntingdonshire to replace the 2009 Core Strategy:
  - Alconbury Enterprise Zone (designated August 2011)
  - Localism Act 2011
  - The National Planning Policy Framework 2012 (NPPF).
- 1.3 Having regard to the three main reasons above and changes in circumstances over the last few years a new retail study was commissioned in July 2012. The previous retail study dated from 2005, although it was updated in 2007 and 2010.
- 1.4 The resulting Huntingdonshire Retail Study 2013 prepared by Deloitte LLP is referred to in this document as 'the retail study'. The advice contained within the retail study has been prepared having regard to the previous retail studies, largely uses the same methodologies and makes use of the same material where appropriate.
- 1.5 This report identifies the Council's decision at April 2013 on what provision to make for retail growth in the Local Plan.

## **2. Shopping in Huntingdonshire**

- 2.1 The shopping habits of residents within Huntingdonshire are influenced by higher order centres, particularly at Peterborough and Cambridge as well as other nearby town centres. The retail study identifies Huntingdonshire's overall catchment area as incorporating parts of adjoining local authority areas, but also notes the other centres as shown on the map in Appendix 1 to the retail study.
- 2.2 Huntingdonshire is fortunate in having four market towns which the retail study confirms have vital and viable town centres. It is the Council's aim to promote Huntingdonshire within the context of planning policy and appropriate cooperation with other authorities. Within a sub-regional context, it is expected that Peterborough and Cambridge will remain the dominant town centres and retain their ongoing prosperity, partly through continued visits from the residents of Huntingdonshire.
- 2.3 A 2009 household survey underpins the analysis contained within the retail study. However it was noted at the outset of the study that



shopping habits are changing, most notably because of the use of the internet and also because of specific changes such as the opening of the busway in August 2011; the improved A421 opening in December 2010; the new Ramsey Tesco and the Co op in Godmanchester. These factors were taken into account in the production of the retail study.

### **3. Planning Policy**

3.1 Paragraphs 23 to 27 of the NPPF include requirements when drawing up Local Plans in respect of retail matters. These are:

- *“Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;*
- *Define a network and hierarchy of centres that is resilient to anticipated future economic changes;*
- *Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;*
- *Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;*
- *Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;*
- *Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;*
- *Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;*
- *Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;*
- *Recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and,*
- *Where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.”*

3.2 In preparing a Local Plan the NPPF requires the Council in paragraph 156 to include strategic policies to deliver the provision of retail, leisure and other commercial development.

3.3 Paragraph 157 states that Local Plans should:

- *Plan positively for the development and infrastructure required in the area to meet the objectives, principles and policies of this Framework;*

- *Be drawn up over an appropriate time scale, preferably a 15-year time horizon, take account of longer term requirements, and be kept up to date;*
- *Be based on co-operation with neighbouring authorities, public, voluntary and private sector organisations;*
- *Indicate broad locations for strategic development on a key diagram and land-use designations on a proposals map;*
- *Allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate;*

## **4. Overall Need and Policy response**

- 4.1 The retail study identifies that there is little or no need for new shops in Huntingdonshire at present taking into account recent developments and existing commitments at Chequers Court and Huntingdon West. When taking into account population growth and the potential for a small increase in market share (up from 73% to 80% for convenience goods while maintaining the same 50% for comparison goods) a need is created starting around 2026.
- 4.2 The Local Plan will provide for housing growth over the period to 2036 but it is recognised that retail forecasts are unlikely to be reliable over such a long time frame. The results provided in the retail study up to 2031 indicate a need for an additional 2000m<sup>2</sup> gross retail floorspace for convenience shopping (or 4500m<sup>2</sup> if using a lesser sales to floor area density); and some 9000m<sup>2</sup> gross retail floorspace for comparison shopping, making a total of 11,000m<sup>2</sup> (or 13,500m<sup>2</sup>). While more may be necessary for the final five years of the plan period, the overall need identified in the retail study is limited, especially as regards convenience shopping.
- 4.3 The policy response is to indicate that an additional 13,700m<sup>2</sup> gross retail floorspace is reasonable to meet need within the Local Plan timeframe to 2036. This provision is contained within draft allocations allowing for shops in the seven largest growth locations within the Huntingdonshire. These retail elements are seen as essential in ensuring that these new areas develop in a sustainable manner avoiding long trips for all shopping requirements. Details of this follow and are summarised in the table in Section 13.
- 4.4 These new growth areas together with the already identified and consented growth of Huntingdon at Chequers Court and Huntingdon West form the overall policy response. The continued revitalisation of the existing town centres and replacement of vacancies where they exist is also expected.

## **5. Chequers Court and Huntingdon West**

- 5.1 The Chequers Court and Huntingdon West proposals are considered to be committed within the context of the retail study and therefore have been taken into account in the baseline figures.
- 5.2 These proposals together amount to some 23,500m<sup>2</sup> of gross floorspace. This is 11,000m<sup>2</sup> of comparison floorspace in Chequers Court and 4000m<sup>2</sup> in Huntingdon West; and 2000m<sup>2</sup> of convenience floorspace in Chequers Court and 6500m<sup>2</sup> in Huntingdon West. The comparison floorspace is made up of a new department store (4000m<sup>2</sup>); new comparison stores in Chequers Court including the redevelopment of the Sainsburys (7000m<sup>2</sup>); and a new row of shops and a third of a new Sainsburys in Huntingdon West (4000m<sup>2</sup>). The convenience floorspace is made up of a new supermarket in Chequers Court (2000m<sup>2</sup>) and two thirds of the new supermarket in Huntingdon West (6500m<sup>2</sup>).
- 5.3 The Chequers Court proposal involves demolition of existing shops and redevelopment of the existing Sainsburys (as well as demolition of offices and the petrol filling station). The existing retail uses amount to some 6500m<sup>2</sup>, therefore the total retail floorspace in this area (13000m<sup>2</sup>) results in an additional retail floorspace of 6500m<sup>2</sup>. The proposal is therefore an increase of 6500m<sup>2</sup> gross retail floorspace compared to that which exists at present. This is made up of the new 4000m<sup>2</sup> department store in place of the petrol filling station; and a net increase of 2500m<sup>2</sup> where the existing offices and shops are being demolished. The Sainsbury's redevelopment onsite does not create more floorspace.
- 5.4 The Stage 3 draft allocation has been amended to reflect the consents for Chequers Court 1100979FUL and 1001751OUT. The allocation boundaries have been amended from the Stage 2 consultation to include the existing Sainsbury supermarket.
- 5.5 Application 1001750FUL proposes a new Sainsbury supermarket on land in Huntingdon West, together with a row of nine additional retail units. This provides for some 10,500m<sup>2</sup> gross retail floorspace (9455m<sup>2</sup> in the supermarket including the canopy and 1094m<sup>2</sup> in the additional shops).
- 5.6 The Stage 3 draft allocation has been amended to refer to the up to date gross figures rather than the net sales floorspace referred to in the Stage 2 consultation and in the Huntingdon West Area Action Plan.
- 5.7 The total figures for Chequers Court and Huntingdon West are therefore 17,000m<sup>2</sup> additional to that which exists, of which some 9000m<sup>2</sup> is expected for comparison retail and 8000m<sup>2</sup> is expected for convenience retail (the convenience proportion being made up of a

new smaller supermarket in Chequers Court, and two thirds of the floorspace in the new Sainsburys in Huntingdon West).

## **6. Alconbury Weald**

- 6.1 Alconbury Weald is the subject of application 1201158OUT which proposes some 150ha of employment, 5000 houses and up to 7000m<sup>2</sup> gross retail floorspace (A1-A5).
- 6.2 Alconbury Weald is a strategic expansion location close to Huntingdon and it is the Council's and the developer's joint ambition that development in this area will support the existing Huntingdon town centre as well as the growth envisaged at Chequers Court and Huntingdon West.
- 6.3 The developer's proposal for 7000m<sup>2</sup> gross retail floorspace is importantly composed of A1, A2, A3, A4 and A5 uses whereas the retail considered in the retail study is limited to A1 uses only.
- 6.4 The retail study assesses the amount of convenience goods capacity created through housing growth at Alconbury as between 1354m<sup>2</sup> gross (50% retention) and 2046m<sup>2</sup> gross (75% retention); and the comparison goods capacity as 2126m<sup>2</sup> gross. This means an upper total of 4172m<sup>2</sup>. The report notes that there may also be potential generated by business workers which leads to a total of 4500m<sup>2</sup>.
- 6.5 The retail study recommends that in addition to any overall upper floorspace limit, consideration be given to additional control measures such as a maximum floorspace size for a foodstore and other qualitative requirements in respect of the role and type of trading of new shopping facilities at Alconbury. Phasing of retail could also be tied to the delivery of specified levels of employment and housing.
- 6.6 Application 1201158OUT itself offers that the largest store should not be more than 1500m<sup>2</sup> gross floorspace. It envisages a 'hub'; three 'local centres' and 'the interchange'. The district centre is proposed to accommodate up to 5000m<sup>2</sup> gross floorspace including the foodstore of up to 1500m<sup>2</sup> gross together with shops and other facilities of a local nature which might include newsagents, pharmacy or a local public house. The three local centres are proposed to comprise a much smaller quantum of retail floorspace of around 220m<sup>2</sup> gross i.e. 1 to 2 shop units. The interchange is proposed for up to 1800m<sup>2</sup> gross retail floorspace to enable cafes and newsagents.
- 6.7 A table provided in the application totals up to 7540m<sup>2</sup> gross floorspace of which 4280m<sup>2</sup> is identified as possibly A1 retail. This figure compares to the upper total identified in the retail study (4172m<sup>2</sup>) as being generated by housing growth at Alconbury Weald.

- 6.8 If this amount of the retail capacity generated by housing growth at Alconbury Weald is catered for by new retail development within the development area, there is however the possibility that Huntingdon town centre and the growth planned in Huntingdon West will not be sufficiently supported. An objection made by Sainsbury on the Stage 2 consultation reflects their concern that supermarket development at Alconbury Weald could affect the profitability of their proposal in Huntingdon West.
- 6.9 Having regard to the amount of capacity created by growth at Alconbury and the desirability of enabling some local retail facilities both for residents and workers, the Stage 3 draft allocation provides for the upper estimate of retail capacity, that is 4200m<sup>2</sup> gross retail floorspace (A1 uses). However there is a requirement that retail does not jeopardise the delivery of Chequers Court and Huntingdon West and a limit on the size of any one store to a gross floorspace less than 1500m<sup>2</sup> which is slightly more than that proposed by the applicant to enable some flexibility. A phasing plan should also be put in place. Additional provision is made for non-A1 uses.

## **7. St Neots East**

- 7.1 St Neots East is a strategic expansion area located approximately 1km from St Neots town centre. There are current planning applications relating to the development of Wintringham Park (the part south of Cambridge Road) 1300178OUT and the development of Loves Farm East (the part north of Cambridge Road) 1300388OUT.
- 7.2 Development of St Neots East will continue a direction established to the east of the railway with the development of Loves Farm. The development of retail shops at Station Square at Loves Farm has commenced and will provide for a total of some 780m<sup>2</sup> gross retail floorspace.
- 7.3 The St Neots East Urban Design Framework 2010 envisages the establishment of a 'District Centre' and a 'Local Centre' in the Wintringham Park area. The total amount of retail anticipated in these areas was not identified.
- 7.4 The Wintringham Park application proposes some 8500m<sup>2</sup> gross retail floorspace composed of A1, A2, A3, A4 and A5 uses for the 'District Centre' and some 500m<sup>2</sup> gross retail floorspace for the 'Local Centre'. In accordance with the Urban Design Framework no retail is proposed in the Loves Farm East application.
- 7.5 The retail study identifies a capacity for 1118m<sup>2</sup> gross of convenience goods floorspace (50% retention) and 1660m<sup>2</sup> gross of comparison goods floorspace (20% retention). This totals some 2778m<sup>2</sup> gross A1

retail floorspace. A test for 75% retention as was undertaken for Alconbury was not included in the retail study for this area.

- 7.6 A table provided within the application identifies that of the 8500m<sup>2</sup> gross retail floorspace proposed for the 'District Centre', some 6800m<sup>2</sup> is expected to be A1 (3900m<sup>2</sup> convenience and 2900m<sup>2</sup> comparison). Of this, some 3900m<sup>2</sup> is expected within a single foodstore (3500m<sup>2</sup> convenience and 400m<sup>2</sup> comparison). Within the 'Local Centre' 200m<sup>2</sup> of the 500m<sup>2</sup> gross retail floorspace is expected to be A1.
- 7.7 An argument is made within the application for the large supermarket to serve not only Wintringham Park but also the area north of Cambridge Road and potentially to cater for latent demand in St Neots. It is noted that the town centre comprises a Waitrose, Iceland, M&S Simply Food, Co-op and Lidl but that the only large supermarket in St Neots is the Tesco outside of the town centre at Barford Road.
- 7.8 The application envisages the supermarket being the anchor of the 'District Centre' and that it will be phased in advance of much development, ready to open in 2018.
- 7.9 The Stage 2 consultation set out that there should be some 1600m<sup>2</sup> of net retail floorspace in the 'District Centre' and 300m<sup>2</sup> of net retail floorspace in the 'Local Centre'. Objections were received on these proposals from the developers of Wintringham Park seeking higher provision.
- 7.10 There is a significant difference between the application proposals for some 7000m<sup>2</sup> of gross retail A1 floorspace, and the retail study's identified capacity for the area of some 2800m<sup>2</sup>.
- 7.11 The retail study identifies concerns in respect of the use of the terms 'District Centre' and 'Local Centre'. These terms may indicate too large a scale of development. Instead the 'District Centre' should be seen as a 'Local Centre' or similar and the 'Local Centre' should be 'Neighbourhood Centre'.
- 7.12 The retail study identifies the possibility of a higher figure than that set out in the capacity analysis having regard to the potential for a large supermarket in the area. It is reasonable to allow for a figure which accommodates not only the supermarket but also some other A1 uses.
- 7.13 The proposed size of the supermarket in the application (3900m<sup>2</sup> gross) may be overly large in this location. It is not clear from the information provided to date how this would fit in with neighbouring uses and create a sense of place. Nevertheless it is accepted that a reasonable size of supermarket can be provided for and that this may cater for some latent demand already existing in St Neots.

7.14 The Stage 3 draft allocation is therefore amended to provide for 4000m<sup>2</sup> gross retail A1 floorspace in the 'St Neots East Centre' with a maximum of 3000m<sup>2</sup> in one supermarket; and 200m<sup>2</sup> gross retail A1 floorspace in the 'Neighbourhood Centre'. Additional provision is made for non-A1 uses.

## **8. Wyton-on-the-Hill**

8.1 The proposals for Wyton-on-the-Hill have developed such that the Stage 3 consultation proposes a significant strategic expansion for 3750 houses in this location. There are currently no retail facilities at Wyton-on-the-Hill.

7.15 The retail study identifies a capacity for 1177m<sup>2</sup> gross of convenience goods floorspace (50% retention) and 1892m<sup>2</sup> gross of comparison goods floorspace (20% retention). This totals some 3069m<sup>2</sup> gross A1 retail floorspace.

7.16 The Stage 2 consultation envisaged a smaller number of houses in this location and a small scale convenience retail facility of up to 600m<sup>2</sup> of net retail floorspace to serve the local community.

7.17 While the number of houses has increased for the Stage 3 consultation, the policy position that Wyton-on-the-Hill residents might be expected to shop primarily in either Huntingdon or St Ives remains.

7.18 However, the retail study notes that St Ives is somewhat lacking in respect of supermarkets, having only Waitrose and Budgens in the town centre and Co-op outside of the town centre. It is evident that there is some demand for better supermarket provision in the area and no sites in St Ives town centre have been put forward.

7.19 The Stage 3 draft allocation therefore makes provision for 3000m<sup>2</sup> gross retail A1 floorspace at Wyton-on-the-Hill in line with the capacity identified in the retail study, with a maximum of 2000m<sup>2</sup> gross in one supermarket. Additional provision is made for non-A1 uses.

## **9. Bearscroft Farm**

9.1 Bearscroft Farm is subject to application 1200685OUT which proposes some 753 dwellings, a primary school; some business land and a local centre. The local centre is planned to accommodate A1, A2, A3 and A5 uses with a combined gross floor area of 950m<sup>2</sup> and net retail sales area for A1, A2, A3 and A5 uses not to exceed 600m<sup>2</sup>.

9.2 Bearscroft Farm is on the edge of Godmanchester which contains a variety of retail facilities, the largest single unit being the recently established Co op which has a gross floor area of some 400m<sup>2</sup> and a

net sales area of 230m<sup>2</sup>. Godmanchester itself is on the edge of Huntingdon to which it looks to for other retail needs.

- 9.3 The Stage 2 consultation identified the site for broadly the uses proposed in the application.
- 9.4 The retail study assesses the capacity created by the level of new housing to be some 700m<sup>2</sup> gross retail floorspace (A1).
- 9.5 The amount of capacity largely accords with the applicant's expressed desires as their proposal for 950m<sup>2</sup> gross floor area envisages part of the space used for services (A2), restaurants (A3) and takeaways (A5). The applicant has also indicated that the units could accommodate a day nursery or similar (D1).
- 9.6 There is no need to exceed the amount of capacity identified in the retail study. The applicant's retail assessment itself identifies a similar capacity and anticipates that the majority of turnover will be generated within the development. Any inflow from existing residents in Godmanchester is expected to be balanced by some outflow to shops such as the existing Co op. Only local facilities are anticipated because Huntingdon is readily accessible and it is important that the proposals there for Chequers Court and Huntingdon West are supported by the growing area.
- 9.7 The Stage 3 draft allocation therefore makes provision for 950m<sup>2</sup> gross retail floorspace (A1, A2, A3, A5) with a maximum of 700m<sup>2</sup> gross for A1 retail.

## **10. RAF Brampton**

- 10.1 The redevelopment of RAF Brampton for some 400 homes and 3.2ha of employment has been identified in the 2011 Urban Design Framework and the Stage 2 consultation.
- 10.2 The capacity identified in the retail study based on 400 new homes is some 400m<sup>2</sup> gross retail floorspace.
- 10.3 The Defence Infrastructure Organisation commented on the Stage 2 consultation to the effect that they considered that that provision of approximately 600m<sup>2</sup> would be justified to support the needs of the future and current occupants of the site and the wider locality. They note that the current on-site shop measures 513m<sup>2</sup>.
- 10.4 However, in this location it is envisaged that it is unlikely that more than one or two local shops will be provided and that the capacity identified in the retail study is appropriate.



- 10.5 The Stage 3 draft allocation therefore makes provision for 400m<sup>2</sup> gross retail floorspace (A1).

## **11. Land South of Ermine Street**

- 11.1 This area, contiguous with the north of Huntingdon with frontages to the A141, A14 and Ermine Street, has been allocated since 2002. It is envisaged that it will accommodate some 1050 homes and a primary school together with related facilities including some retail.
- 11.2 The most recent application for development of the site, 1001712OUT, envisages a local centre which could feature local shops to help meet the day to day shopping needs of the new neighbourhood. A pub/restaurant is also proposed within this local centre.
- 11.3 The retail study identifies a capacity of some 1000m<sup>2</sup> gross retail floorspace generated by the additional population. The figure identified in the Stage 2 consultation was for 800m<sup>2</sup> of net retail floorspace. There were no comments on the Stage 2 consultation relating to the amount of retail.
- 11.4 The Stage 3 draft allocation therefore makes provision for 1000m<sup>2</sup> of gross retail floorspace (A1) with a maximum of 400m<sup>2</sup> gross in one store. Additional provision is made for a pub/restaurant.

## **12. St Ives West**

- 12.1 Some 500 houses together with large areas of open space are proposed to the west of St Ives, contiguous with recent development in this location. The St Ives West Urban Design Framework 2012 envisages a local shop within the area.
- 12.2 The retail study identified a capacity of some 450m<sup>2</sup> gross retail floorspace being created by the additional housing in this area.
- 12.3 It is appropriate to make only limited provision for retail in this area as the design identified in the Urban Design Framework does not envisage any large shops.
- 12.4 The Stage 3 draft allocation therefore makes provision for 450m<sup>2</sup> gross retail floorspace (A1).

### 13. Summary and Conclusions

13.1 The current and near future retail needs of the District have been largely met by the committed proposals at Chequers Court and Huntingdon West (as well as the recently constructed Tesco Ramsey; Co op Godmanchester; and various smaller shops).

13.2 The following table identifies Stage 3 draft allocations compared to the retail study advice. All figures are gross A1 retail floorspace.

Site	Retail Study Capacity	Stage 3 draft allocation
Alconbury Weald	3500m <sup>2</sup> (or 4500m <sup>2</sup> )  1364m <sup>2</sup> (or 2046m <sup>2</sup> ) convenience 2126m <sup>2</sup> comparison	4200m <sup>2</sup> Maximum of 1500m <sup>2</sup> in one store
St Neots East	2800m <sup>2</sup>  1118m <sup>2</sup> convenience 1660m <sup>2</sup> comparison	Centre: 4000m <sup>2</sup> Maximum of 3000m <sup>2</sup> in one store Neighbourhood: 200m <sup>2</sup>
Wyton-on-the-Hill	3000m <sup>2</sup>  1177m <sup>2</sup> convenience 1892m <sup>2</sup> comparison	3000m <sup>2</sup> Maximum of 2000m <sup>2</sup> in one store
Bearcroft Farm	700m <sup>2</sup>  303m <sup>2</sup> convenience 418m <sup>2</sup> comparison	700m <sup>2</sup>
RAF Brampton	400m <sup>2</sup>  156m <sup>2</sup> convenience 257m <sup>2</sup> comparison	400m <sup>2</sup>
Land South of Ermine Street	1000m <sup>2</sup>  410m <sup>2</sup> convenience 517m <sup>2</sup> comparison	1000m <sup>2</sup> Maximum of 400m <sup>2</sup> in one store
St Ives West	450m <sup>2</sup>  188m <sup>2</sup> convenience 250m <sup>2</sup> comparison	400m <sup>2</sup>
Total	11850m <sup>2</sup> (or 12850m <sup>2</sup> )	13700m <sup>2</sup>

13.2 The retail study identifies that there is more capacity for comparison retail than there is capacity for convenience retail generated by the additional population in each location. However, in the growth locations

identified it is anticipated that the main need to be met is that of day to day convenience needs. This may mean that less than the total identified in the draft allocation is required. The development guidance attached to each draft allocation identifies the main needs anticipated to be met.

- 13.3 The proposals contained within the Stage 3 Local Plan consultation are generally consistent with the recommendations of the retail study and will ensure that the Council meets its obligations in accordance with the National Planning Policy Framework.