

Huntingdonshire District

Retail and Commercial Leisure Needs Assessment

on behalf of Huntingdonshire District Council

February 2017

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1.0 Introduction

Instruction

- 1.1 Nexus Planning (Nexus) was commissioned by the Huntingdonshire District Council ('the Council') in June 2016 to undertake a Retail and Leisure Study for the District of Huntingdonshire.
- 1.2 This 2016 Retail and Leisure Study will supersede the previous retail study carried out in 2013 by Deloitte. The 2013 Huntingdonshire Retail Study utilised household survey data from the 2010 study, which was produced by Roger Tym and Partners (RTP).
- 1.3 The Huntingdonshire Retail and Leisure Study will form the evidence base upon which the emerging Huntingdonshire Local Plan (up to 2036) will be established.
- 1.4 The approach adopted by Nexus and the brief provided by the Council, has been refined to reflect the latest Government guidance provided in the National Planning Policy Framework (NPPF) (March 2012) and National Planning Practice Guidance (NPPG) (2014).
- 1.5 The detailed aims and objectives for this study therefore include the following:
 - i. A review of the national planning policy position and an appraisal of economic, retail and leisure trends at a national and regional level;
 - ii. Health-check analysis of the four market towns of Huntingdon, St Neots, St Ives and Ramsey. This includes their town centre, edge/ out of town retail and commercial leisure provision (including liaison with stakeholders in all centres);
 - iii. Completion and analysis of a householder survey of retail and commercial leisure activity and expenditure patterns (completed by 1,000 households);
 - iv. Calculation of anticipated residual expenditure availability for convenience retailing, comparison retailing and commercial leisure activities at 2026, 2031 and 2036, reflecting anticipated growth in the Draft Local Plan to 2036;
 - v. A quantitative assessment of the potential change in floorspace requirements;
 - vi. Recommendations on the nature and timing of the delivery of any future convenience retail, comparison retail and commercial leisure floorspace requirements;

- vii. Recommendations as to whether the Council need to retain the land allocated within the Huntingdon West Area Action Plan for a Sainsbury's supermarket as an allocation for retail purposes;
- viii. Recommendations on the appropriate future mix of uses within each market town centre; and
- ix. Advice on how the Council can boost the resilience of Huntingdonshire's market towns.

1.6 This Study is supported by new empirical research, with NEMS Market Research Limited (NEMS) undertaking surveys of 1,000 households within a defined Study Area in June 2016. The Study Area for the household survey encompasses 13 zones, which are based on postcode sectors grouped to reflect areas that are expected to exhibit similar patterns of shopping behaviour.

1.7 To complete this study, Nexus has drawn on a comprehensive survey of existing operators within the District and examined the existing published data sources, such as Experian Goad, and Venuescore. Nexus has also referred to the latest Experian population and expenditure data (published by Experian in 2015) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

Structure of Report

1.8 This report is structured as follows:

- **Section 2** sets out the context for the Retail and Leisure Study by detailing analysis of key current and future retail trends;
- **Section 3** acknowledges the up-to-date position in respect of relevant national, regional and local planning policy as it relates to retail;
- **Section 4** provides a synopsis of the vitality and viability of Huntingdonshire's four Market Towns (Huntingdon, St Neots, St Ives and Ramsey);
- **Section 5** details our assessments of the current and future population and expenditure levels within the Study Area;
- **Section 6** comprises a review of the survey research and considers the key findings with regard to shopping trip patterns throughout the Study Area;

- **Section 7** provides our analysis in respect to the quantitative and qualitative need for further convenience and comparison goods retail floorspace over the assessment period (to 2036);
- **Section 8** details the existing leisure provision in Huntingdonshire and considers future leisure capacity over the plan period; and
- **In Section 9** we identify our recommendations in respect of the Council's future retail, town centre and leisure strategy.

2.0 Current and Emerging Retail Trends

2.1 Nexus has reviewed recent research completed by a number of retail research providers, including but not limited to; Colliers International, Office for National Statistics (ONS), Experian, and Verdict. Through the analysis of this research we can ascertain information on recent trends and future forecasts for the UK retail market. Additional research has also been undertaken on trends within Market Towns that specifically relates to the centres of Huntingdon, St Neots, St Ives and Ramsey.

Current Retail Picture - UK

2.2 Since the 1950's, the UK retail market has, in general, experienced expansive growth. The rate of which the growth is occurring has increased in speed in recent years. The level of growth is resultant of several influencing factors. These factors are summarised in brief below:

1. Improving standards of living.
2. A population with higher disposable incomes;
3. The popularity of obtaining fiscal credit;
4. Changes in modes of transport; and
5. New (digital) technologies, including online retailing.

2.3 The key identified trends are summarised in brief below, and expanded within the subsequent sections:

- I. The economic climate that prevailed during the recent recession (circa 2008 to 2013) had substantial impacts on the retail market; by restricting resident incomes and reducing standards of living. In consequence, the level of spending retracted. Since 2013 (recognised as being the end of the recession in the UK) the economy has been slowly regaining momentum and economic reports released in early 2016 indicate a return to pre-recession levels`. The most recent release from the Office for National Statistics (ONS) on Retail Sales (published in May 2016)¹ identified that May 2016 represented the 30th consecutive month of growth for retail sales UK wide.
- II. As with the retail market, the retail property landscape in the UK has dramatically

¹ 'Statistical bulletin: Retail Sales' ONS, March 2016

developed over the last 50 years. The post-war years saw a significant redevelopment effort focused on town centres. However, in more recent times, and most notably during the 1990s, the retail landscape changed following the introduction of retail warehouse parks and large out-of-town regional shopping malls. But as will be explained later in in this section, new retail development is once again becoming more focused on town centre locations.

- III. The physical location of where consumers are spending has also undergone a significant shift over the past 15 years. Recent findings of Verdict Retail demonstrate this shift. Verdict's 2013 research identified that spending within town centres as a proportion of overall spending declined from 50.7% in 2003 to 45.0% at 2013. In contrast, spending in out-of-centre locations increased over the same period (2003 to 2013) by 4.7%; rising from 31.5% in 2003 to 36.2% in 2013². The movement towards out-of-centre locations has directed recent Governments to endorsing their commitment to UK town centres through the nationwide promotion of the 'town centre first' policy approach. The 'town centre first' approach is outlined at Paragraph 23 of the National Planning Policy Framework (NPPF) (March 2012). Further Government support for directing new retail development towards town centres is set out in the March 2014 publication of the Ensuring the Vitality of Town Centres National Planning Practice Guidance.
- IV. Another factor that has led to notable changes in the retail market is the rise in "E-tailing" (or "E-commerce"). The popularity and increased availability of the internet, as well as the growing confidence of consumers in making purchases online, has led to a distinctive change in the way in which goods and services are purchased. Reports on "E-tailing" suggest it currently accounts for somewhere between one in every five to ten pounds that are spent in the UK³ (taking account of monthly fluctuations). One report released in March 2016 stated that 20% of retail sales in the UK were completed online⁴.
- V. Consumer expectations are also continually evolving, producing a dynamic and unstable retail market. The providers operating in the market are required to evolve as a result of numerous dynamic factors, including – the characteristics of the UK population, consumer demands, popularity in private car ownership, planning policy

²'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

³'UK online retail sales to reach £62.7bn in 2020', Verdict Retail, 17 September 2015

⁴'More than 20% of UK retail sales took place online in February, as consumers moved more spending to the internet', Chloe Rigby, Internet Retailing Online, 6 March 2016

and digital advances. The diverse nature of the factors which form consumer expectations is forcing retailers to pursue new innovative development proposals. Consumers are seeking more out of their shopping experience and wanting it now.

- 2.4** Additionally, it is important to recognise the recent results of the public referendum for the UK to leave the European Union in late June 2016 ('Brexit'). The impact on the UK economy, and in particular the retail and leisure markets, is currently unknown and commentary on the topic is changing weekly. As such, it may be appropriate to issue an Addendum to this report at the time the effects (positive or negative) are more developed and predicted trends can be supported by observed evidence. For example, it will be important to monitor industry forecast data provided by experts such as Experian.

Current Retail Picture

Household Spending and Labour Trends

- 2.5** In their August 2015 Retail Report, Colliers International recognised that since Quarter 1 2011 household spending has steadily increased each year⁵. Following 2.3% year-on-year growth in Quarter 1 2015, growth in household spending is at the pre-recession levels of 2006 and 2007. Trends in real wages have been supporting the increase in spending. Real wages reached a 4.5% year-on-year growth rate in March 2015. This is the highest level since March 2007. The Centre for Retail Research published their Retail Forecast for 2016-2017 in January 2016 which support Colliers findings. In this forecast they confirm (as suggested by the figures above) the UK retail sector has enjoyed uninterrupted growth since 2013⁶.
- 2.6** Domestic economic drivers of UK retail performance are linked to two key factors:
- I. Low inflation – drives growth in real wages, strengthens household confidence and disposable income
 - II. Low interest rates – lead to low mortgage rates, which in turn results in more money in the pockets of borrowers
- 2.7** Each of the factors set out above have a significant impact on the public's general confidence, and in turn their tendency to spend their earnings on retail goods. Most notably, reports on consumer confidence indicate that it is currently the strongest it has been for over

⁵ 'Midsummer Retail Report', Colliers, August 2015

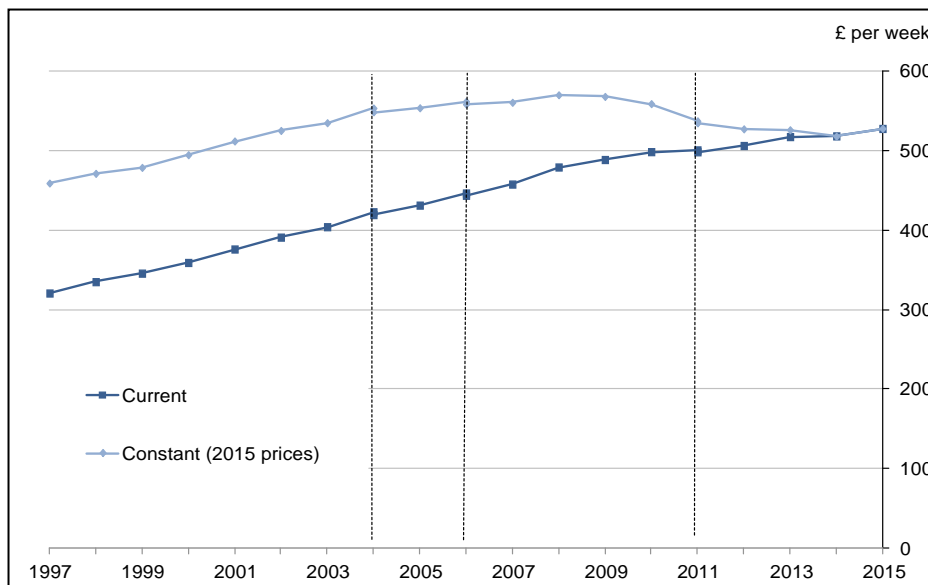
⁶ 'The Retail Forecast for 2016-2017', Centre for Retail Research, 5 January 2016

a decade⁷. Total recorded spending for Quarter 4 2015 was £279.1 billion. This is indicative of considerable increases in spending when considering the low level of spending which occurred in 2009. Notably, in Quarter 2 2009 spending hit a low of £250.8 billion⁸, as reported by Colliers.

2.8 Also of note are current trends in the labour market. This information is sourced from the Office for National Statistics (ONS). The median gross earning for full-time employees in the UK has increased and as at April 2016 sat at £528 per week, an increase of 1.8% from £518 per week a year earlier (April 2015)⁹. The graph (Figure 2.1) illustrates how earnings have increased since 1997, and further exemplifies the deceleration in year-on-year growth that has occurred since the start of the recession in 2008.

2.9 Since the year 2010 taxation rates and levels have increased (including VAT, national insurance contributions, and capital gains tax). As a direct result of these increases consumers’ spending power is reduced, impacting upon households’ spending. Therefore, the gross increase of pay in consumers’ pockets cannot be used as a direct comparison.

Figure 2.1 | Median full-time gross weekly earnings in current and constant (2015) prices, UK, April 1997 to 2015



Source: ‘Statistical bulletin: Annual Survey of Hours and Earnings: Provisional Results’, ONS, 18 November 2015

2.10 What is more, the employment rate (the proportion of people aged 16 to 64 who were in work) was 74.1% in March 2016. This is the highest score since records began in 1971. The

⁷ ‘UK Economic Outlook’, PwC, March 2016

⁸ ‘Midsummer Retail Report’, Colliers, August 2015

⁹ ‘Statistical bulletin: Annual Survey of Hours and Earnings: 2015 Provisional Results’, ONS, 18 November 2015

unemployment rate was recorded as being 5.1% at March 2016¹⁰. When considering this figure against the 2014-2015 rates it indicates a decreasing trend. The UK unemployment rate was recorded as being 5.7% between October and December 2014.

UK Retail Property Market

- 2.11** In 2011 Colliers CRE reported that economic conditions were resulting in significant structural changes to the UK high street, with many retailers displaying signs of caution by decreasing the size of their property portfolios, completely abandoning weaker towns and putting a concerted effort into acquiring sites in city centres and major regional shopping centres¹¹. At this time comparison goods retailers were finding it increasingly difficult to justify being represented in every town in the UK. However, over the five years to 2016, the circumstances inflicted upon UK town centres have changed dramatically. More recent reports, including those published by Colliers, Verdict, PwC, provide a more positive picture for high street retail. Most notably, Colliers declare that high streets are 'no longer dead or dying'. Representative of this is the fact that in 2014 investment into high street assets jumped by circa 30% to £2.39 billion¹². There have been fewer retailer failures on the high street and its retailers' requirements continue to increase, report Colliers.
- 2.12** In 2014, Colliers acknowledged that recent improvements to the economic outlook were beginning to show positive results for town centres¹³. For example, increased consumer confidence and retailer expansion was resulting in a reduction in vacant retail space. However, Colliers remained cautious at this time (2014), and in their report explained that even though the speed at which a significant amount of vacant space was being taken off the market and the positivity of the current economic indicators suggested a return to normalcy, online retailing flourished during the recession and high street stores struggled. They warned retailers to continue with caution when deciding to build existing store networks.
- 2.13** In terms of current vacancy rates, the UK average rate of retail shopping pitches as at March 2016 was identified by Experian as 11.3%¹⁴. The rate of vacancies is described by Colliers as being 'stubbornly high' as it is not typical or reflective of the total economic or retail climate. Colliers explains that in light of recent advances in the performance of the UK economy it should have improved a lot more against its 2012 peak of 16.3%. Perhaps we should expect the vacancy rate to drop to a figure that is more akin to pre-recession time – for example in 2008 the vacancy rate dropped to 7.0%¹⁵. In terms of actual quantities, reports suggest some

¹⁰ 'Labour Market Statistics' ONS, 16 March 2016

¹¹ 'Great Britain Retail: Autumn 2011', Colliers CRE, 2011

¹² 'Midsummer Retail Report: 2015', Colliers, August 2015

¹³ 'National Retail Barometer: Summer 2014', Colliers, September 2014

¹⁴ Experian GOAD Category Report, Experian March 2016

¹⁵ 'Midsummer Retail Report: 2015', Colliers, August 2015

46,000 UK shops lie unoccupied, and around a third of those have been empty for more than three years¹⁶.

- 2.14** It is vital to distinguish that this high level of vacancies is driven mainly by non-prime units. Colliers identify, in their Midsummer Report, that the prime unit vacancy rate sits around 7.5% while non-prime is as high as 17%. As a consequence of the recent economic difficulty that troubled the early 2000s and subsequent lack of investment into retail property, we have seen demand drop considerably for 'poorer quality stock'. Such stock is often found in secondary shopping frontages within smaller towns. As a result this poorer quality stock suffers from a proportionate reduction in value (and often rent)¹⁷.
- 2.15** The significantly high number of voids during the recession, the lack of investment in premises, including upkeep, led to a harmful impact on the overall attractiveness of town centres. As set out within the recommendations of Mary Portas' December 2011 Review into the future of UK high streets – there is a recognised necessity to encourage the redevelopment of high street retail space. To do this Portas explained it will be important to empower local authorities to address negligent landlords, especially those of long-term vacant units¹⁸.
- 2.16** In short, the incessantly high average vacancy rate, despite improving economic conditions, is representative of a discernible divergence between in-demand high quality units and diminishing demand for secondary premises in smaller locations.

Other Factors Influencing the Improving Town Centre Environment

- 2.17** It is important to recognise that the improving high street environment is not solely driven by 'pure' retail offerings. The food and beverage sector is a significant contributing factor to the recent success and growth of UK high streets. Colliers explains the desire of UK shoppers to 'graze' while they shop has seen a significant boost in the quantity of coffee shops, restaurants, bars and grab-and-go convenience food outlets on UK high streets. In addition to this, the popularity of going out to eat also brings more visitors to the town centre¹⁹.
- 2.18** Further to this, as digital technologies continue to advance the importance of understanding and operating within the digital world of retail shopping is becoming just as essential as trading in the traditional physical shopping world. The challenges set by online retailing are irrefutable. However, large cities, towns, or shopping centres, which offer an 'experience' and

¹⁶ 'Where have all Britain's shoppers gone?', The Guardian, 26 April 2016

¹⁷ 'National Retail Barometer Autumn 2015', Colliers, Autumn 2015

¹⁸ 'Portas Review – An independent review into the future of our high streets', Mary Portas, 2012

¹⁹ 'UK Economic Outlook', PwC, March 2016

choice for customers with high volume trading potential for the retailers, continue to be attractive²⁰. Growing investments in physical retail development is indicative of the desire of shoppers to have a physical retail experience and not just make all of their retail purchases online.

- 2.19** To conclude, UK town centres and high streets provide highly visible and empirical evidence of the scale of the economic downturn (2008 to 2013). Recent improvements in the economy (as evident when reviewing household spending and average earnings statistics) have seen increased investment into town centre retail stores and a drop in prime unit vacancy rates.

Trends in Convenience Retailing

- 2.20** A 2015 study by Retail Economics reported that spending on food accounted for 40% of all retail spend nationwide²¹. As a consequence, trends in food retailing have a significant influence on retail trends in general.

- 2.21** Instability currently prevails in the food retailing market and supermarkets are most affected. Numerous supermarket chains are currently in the process of consolidating their assets; selling stores, pulling construction programmes, and letting go of sites already with planning permission.

Food Retailing Back in the Town Centre

- 2.22** The structure of food and grocery retailing has changed significantly since the departure from large format out-of-centre food stores. During the 1990's a significant number of out-of-centre food stores with large floor plates were developed and provided cheap rent when compared to town centre locations. The success of these developments was dependent on the dominant transport culture, which at that time was much more tolerant of the reliance on the car and people were generally happy to travel greater distances to shop.
- 2.23** As out-of-centre food stores thrived, town centres suffered. However, following recognition of these detrimental impacts, central Government enforced stricter local planning rules which make these types of development harder to gain planning permission for. Foremost was the 'town centre first' approach prescribed by the NPPF in 2012 and NPPG in 2014. Application of this policy considerably reduced the number of new out of town food stores obtaining

²⁰ 'Midsummer Retail Report' Colliers, August 2015

²¹ UK Retail Sales – Retail Economics March 2016

planning permission²².

- 2.24** Food and grocery retailers have had to return to town centres and adopt alternative methods of retailing. The most common approach taken is to offer lower cost product ranges. Following that, we also see retailers offering much more flexible models, including protracted opening hours (sometimes staying open 24 hours), opportunity to shop online, home delivery, as well as click and collect. Some retailers have also diversified into non-food items including fuel. Also in a bid to keep and win new customers many retailers have opted to put a concerted effort into branding, marketing, including presence on social media. Tapping in to the modern consumer's desire to purchase food on the go several food retailers now have a presence in dense town centre locations where their stores are accommodated over much smaller floor plates such as Sainsbury's Local, Tesco Express and Morrisons M Local Stores (now 'My Local').
- 2.25** Growth figures in sales in the food and grocery within UK town centres are evidence that food and grocery stores are reasserting their presence within the town centre. Verdict Research identified that sales made in UK town centres on the food and groceries has developed from 16.9% in 2006 to 24.2% in 2013²³.

The Rise of the Food Discounter

- 2.26** In 2013, Mintel reported that the recession, along with a period of high inflation, impacted on consumer behaviours and the wider dynamics of grocery retailing. Consumers who have less disposable income are likely to seek out food and grocery items that are offered at the lowest price, or more importantly, food and groceries which represent the best value for money²⁴. Therefore, in order to attract shoppers, food retailers have to compete not just on price points but by also offering the best in high quality good value products. The complex nature of consumer demands results in a dynamic market that is often difficult to negotiate. The rise of online food retailing adds yet another dimension to this market. Reports by Retail Economics suggest that while the general retail food market suffered, the number of online food purchases rose by 10.3% year-on-year in January 2016²⁵
- 2.27** The scene set above indicates the food sector is facing a number of unique structural challenges, which is causing issues for food operations and subsequently restricting growth in this sector. One of the overriding challenges comes from the intense price competition

²² 'Retail Planning Decisions under the NPPF - Commissioned by the Association of Convenience Stores', Jonathan Baldo, Town Centres & Retail Planning Consultant, November 2013

²³ 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

²⁴ Food and Drink Retailing. 'Mintel, March 2013

²⁵ UK food and grocery, retail Economics, March 2016

created by the key food discounters (Aldi and Lidl), which are taking market share away from the big four grocers (Tesco, Sainsbury's, Morrisons, Asda)²⁶.

- 2.28** Illustrating the dynamic nature of the struggling food and grocery environment at present is the number of recent sales of a significant number of food and grocery outlets by major food retailers. For example, Morrisons let go of 140 of Morrisons M Local Stores nationwide in late 2015. A decision forced upon Morrisons due to struggling profit ration even though convenience stores are the fastest-growing format in the UK²⁷. Making the sale of the Morrisons M Local Stores even more surprising are the 2013 reports from providers such as Mintel who suggested there has been a massive shift away from superstores to more convenient shopping²⁸. The first Morrisons M Local Store was only opened in 2011 but after reporting an annual operating loss of £36m on the stores; contributing to the company's total annual loss of £792m, the decision to sell was made. Some of the stores have since been rebranded in a bid to compete with other centrally located top-up convenience stores meeting the demand driven by consumer's increasingly 'hectic' lifestyles. More recently, in early 2016 Sainsbury announced they would be closing down all 16 of its Netto discount grocery stores nationwide²⁹. The majority of the stores are located in the north of England and their closure illustrates that this time of uncertainty still prevails.
- 2.29** While the food retail market is still generally described as struggling, up-to-date March 2016 research produced by Retail Economics showed that grocery sales are continuing with their recent run of better performance with sales up 1.5%, year-on-year, the strongest since February 2014. March 2016 sales represent the third consecutive month of growth³⁰.
- 2.30** Notwithstanding this, the food and grocery market is predicted to remain fiercely competitive, meaning retailers will be forced to keep their sales margins as compressed as possible.
- 2.31** As recent as September 2015, Retail Economics reported that the UK's largest retailer, Tesco, and their struggles over the past few years are predicted to endure. Retail Economics predicts that it will be competition from the discounters Aldi and Lidl, in particular that will continue to diminish Tesco's market share. While broader market trends, such as consumers' desire to eat-out and purchase only 'grab and go' food at their convenience, will stifle growth across Tesco's core large format superstores – reducing as much as 50% of sales³¹. In April 2016 the Tesco Chief Executive hailed the supermarkets £162 million statutory pre-tax profit for the 2015 / 2016 as "significant progress" when compared to the retailers reported £6.2

²⁶ UK Retail Sales, Retail Economics, March 2016

²⁷ Morrisons sells its chain of convenience stores', BBC online, 9th September 2015

²⁸ 'Food UK', Mintel, April 2016

²⁹ Sainsbury's to close Netto stores' BBC online, 4th July 2016

³⁰ 'UK Retail Sales', retail Economics March 2016

³¹ 'UK Food and Grocery', Retail Economics, September 2015

billion loss of the 2014 / 2015. However, the Chief Executive stressed that recovery would not be a straight process as the food retailing market remained “challenging, deflationary and uncertain”³². In order to be successful in the market retailers are forced to cut prices. This means that discount food retailers remain the fastest growing supermarkets in UK town centres.

- 2.32** When analysing the performance of Aldi, who are considered a food and grocery discounter, Retail Economics describes that they have “attacked the heartland of UK grocery” by undercutting the ‘big four’ with highly competitive prices and investing in more high quality premium produce. This approach has broadened Aldi’s appeal to more affluent customers. In the same way, Lidl has adopted an aggressive growth programme including ambitious store expansion. To date, the strategy has achieved what it has intended by growing Lidl’s market share. The widening of product ranges will help broaden market appeal while a focus on more alcohol will help support sales³³.
- 2.33** In late 2015, reports on Lidl and Aldi’s success suggested their joint share of the groceries market doubled to 10% in just three years³⁴. Even so, Tesco remains the UK’s largest supermarket with a 27.9% market share, while Sainsbury’s has 16.6%, with Asda on 16.4%. Followed by – Morrisons 10.8%, The Co-operative 6.3%, Aldi 5.6%, Waitrose 5.2%, and Lidl 4.4%.

Consumer Behaviours When Making Food and Grocery Purchases

- 2.34** The UK food market has been shaped in recent years by the broad change in shopping habits with many customers opting to complete smaller but more frequent grocery shops. Fewer households now complete the traditional once-a-week “big shop”. In their March 2015 report, the University of Southampton (published as part of an Economic and Social Research Council study) predicts that forecasts for 2019 will see the convenience store grocery sector account for almost a quarter (24.1%) of total UK grocery sales up from 21.4% in 2014³⁵.
- 2.35** An additional demand-driven factor shaping the UK food retail market relates to consumers’ desire to purchase locally sourced food. A 2013 Ethical Consumers Market report provides³⁶ evidence to suggest that the number of shoppers specifically looking to buy local produce increased from 15% in 2005 to 42% in 2012. Of particular note, the survey found more than

³² ‘Tesco shares hit by warning profit growth to slow’, BBC Business Online, 13 April 2016

³³ ‘UK Food and Grocery’, Retail Economics, September 2015

³⁴ ‘Aldi and Lidl double market share in three years’, BBC Online, 17 November 2015

³⁵ ‘British High Streets: From Crisis to Recovery? – A Comprehensive Review of the Evidence’, Economic and Social Research Council and the University of Southampton, March 2015

³⁶ ‘Ethical Consumer Market Report’, Ethical Consumer Research Association, 2013

40% of local shoppers said they were prepared to pay a premium for locally produced foods. Tesco benefited from this trend through the promotion of a 'Love British Food' promotion which in 2011/2012 saw Tesco sales of local produce reach of £1 billion and over 50% of Tesco customers purchasing more locally sourced food than they were five years ago³⁷. Other larger chain supermarkets have recognised the desire of shoppers to buy locally. Sainsbury released a British classic range of ready meals, while Morrisons promoted a range called the Best of British.

- 2.36** To summarise, the competitive nature and price driven market for food and grocery retailing continues to force supermarkets to adapt and seek out how they can do things differently in order to attract consumers.

Trends in Comparison Retailers

- 2.37** The comparison retail market saw the biggest drop in trade during the 2008-2013 economic recession. The Economic and Social Research Council, in their March 2015 report, attribute the drop in sales to two corresponding factors – (1) consumers' general reluctance to spend on comparison 'big-ticket' items, and (2) the fact comparison retailers are often more susceptible to online price comparison. In recent years, consumers are growing more confident in making online purchases of comparison goods meaning town centre stores continue to suffer in consequence. The strong performance of comparison online retailing is supported by reports showing high levels of year-on-year growth in the sector.
- 2.38** There are two types of comparison goods retailers that are identified as suffering the most - those whose trade has been fundamentally changed by competition from online providers (e.g. music and video retailers, book shops – which consumers happily use in a virtual form) and second, those whose products are bulky and space-consuming, meaning high operational costs for high street stores has left them uncompetitive in contrast to out-of-centre and online retailers with much lower tenancy costs. That said, certain types of comparison-goods retailers have increased their share of town centre trade. For example, Verdict data indicated that clothing and footwear retailers increased their share from 20.5% to 25.4% from 2007 to 2013, and department stores from 7.4% to 9.5%.
- 2.39** When evaluating the current trends influencing the performance of the comparison retail market, it is important to recognise the physical shift that is evident in town centres nationwide. The number of comparison retail units present in UK high streets is decreasing. This trend is evident when reviewing Experian Goad data which identifies that in August 2015

³⁷ 'Love British Food', <http://www.lovebritishfood.co.uk/taking-part/retailers>, 2012

the comparison sector accounted for 32.1%³⁸ of all town centre units, dropping from 33.4%³⁹ in 2011 (during the recession) and 47.4%⁴⁰ in 2006 (before the recession).

- 2.40** Against this background, in their Midsummer Retail Report, Colliers predicts that comparison retailers are holding on to their current units in search of larger higher quality retail units where they can provide a wider range of items. This is driven by the need to provide consumers with a high-quality shopping environment, coupled with their expectations for a wide selection of goods being available in store. Retailers must meet these demands in order to compete with the rise of e-tailing for comparison goods.
- 2.41** The recent liquidation of British Home Stores (BHS) in April 2016, further illustrates the struggles facing comparison retailers. Reports on the reasons for the failure of BHS identify the following issues facing the company – (1) the internet, (2) international competition, (3) the on-going impacts of the recession and (4) their failure to keep up with the demands of consumers for innovation in retailing⁴¹.
- 2.42** In summary, comparison retailing is fuelled by fierce competition, in particular that made possible by the internet companies operating in the comparison market need to fight for their sales through adapting to the new and modern desires and needs of the consumer, and most importantly acknowledge the fact they are likely to compare prices over the internet. How to combine a physical and online store is essential to success, as will be established later on under the sub-title “E-Tailing”. The option of ‘click and collect’ is one such combination being introduced in response to growing popularity. In order to attract customers into a physical store it is vital that it is both (1) physically and aesthetically pleasing and exciting, making for an enjoyable experience for the shopper, as well as (2) providing for a wide array of different products that they can see and touch.

Out-of-Centre

- 2.43** From 1996 to 2006 out-of-town retailing was recognised as the ‘engine of retailing growth’. The following figures quite clearly illustrate this – between 1996 and 2006 retail sales as a whole increased by 62.1% and sales of out-of-town stores grew nearly twice as fast, at 118%⁴².
- 2.44** The growth of out-of-centre retailing has been constrained by the ‘town centre first’ policy regime enforced through the NPPF. As a consequence of the prevailing policy regime,

³⁸ Experian, March 2016

³⁹ WYG, 2011

⁴⁰ GVA Grimley, 2006

⁴¹ The Guardian Online, April 2016

⁴² GVA Grimley, March 2006

traditionally out-of-centre retailers (for example supermarkets) are being re-focussed back into the centre of UK towns. Most notable, are the number of larger food retailers who now occupy units within the high streets and local centres of the UK, for example Sainsbury's Local, Tesco Extra and Little Waitrose.

- 2.45** In 2013, Deloitte picked out the fact that there is a limit to how much an out-of-centre shopping centre can fully meet the daily needs of consumers⁴³. Deloitte reported the drive of consumers to out-of-centre locations is primarily motivated by their desire to seek out lower prices, convenience and the wide range of goods available at out-of-centre locations by virtue of their larger store formats. However, changes in consumer habits has driven a return to smaller format shops in more centrally located and accessible locations. As consumer habits become more aligned, the draw of out-of-centre shopping venues is weakened.
- 2.46** One obvious result of new consumer behaviours has led to larger retailers opting to provide 'click and collect' services within their smaller retail units. This service enables consumers to have a much wider variety of goods available to them, but for collection to take place in an easily accessible and convenient location suitable for their busy lifestyles.
- 2.47** The Economic and Social Research Council reported that rising numbers of consumers are less convinced by the costs versus benefits balance of the out-of-centre superstore/retail park proposition and have sought convenience at the 'local' level and in the 'community'.

Shopping Centre/ Retail Park Investment

- 2.48** In recent years the level of shopping centre development in the UK has seen some progression, following a number of years of very minimal development. In 2011, Colliers reported that shopping centre development was at a standstill and little activity was anticipated over the next four years to 2015⁴⁴.
- 2.49** More recent reports suggest that we should not expect an inundation of new shopping centres to open in the UK (i.e. we will not seek the peak levels reached during the 1980's to 1990's). More recent Colliers research (released in August 2015) reported that the shopping centre market has assumed a dramatic shift, changing from an investment no one was interested in procuring to a "must-have" for investors within a very short time period.
- 2.50** However, some caution is still advised as demand and investment in shopping centre units is focused on prime and regionally dominant assets. In this current climate, it is only those high

⁴³ The Deloitte Consumer Review 2013

⁴⁴ Colliers Midsummer Retail Report – August 2015

quality tenants that can support the much desired high-quality shopping experience.

2.51 In contrast, shopping centres considered to be in the secondary market (i.e. not A Grade or prime shopping centre) should be addressed with a lot more caution. Tenants are seeking shorter lease terms and secondary shopping centres have been described as being in structural decline.

2.52 It is clear that the draw of shopping centres includes the experience, and not the retail offer alone. Consumers are increasingly willing to travel to larger out of town shopping centres for their overall experience and to use the leisure facilities. In response to this, the split between retail and leisure units present within UK shopping centres is shifting; with more experiential offers in the form of leisure services. In 2012, the Portas Review recognised this shift highlighting that:

“...Epic and immersive experiences offered by today’s new breed of shopping mall. Modern shopping centres; for example Westfield, bring together cinema premieres, world class restaurants, bowling alleys, art galleries and luxury brands – replacing the lightless, soulless experiences of the past⁴⁵.”

2.53 When comparing the operation of shopping centres in comparison to high streets, it is useful to reference the submission of the British Property Federation on the Portas Review, in which the Federation stated:

“Shopping centres and other out-of-town formats often have the advantage of single ownership. The landlord is able to create an identity for the centre, choose the retail mix, manage the centre so that it reinforces the brand, co-ordinate marketing and refresh the centre through regular reinvestment. Single ownership is rare on our high streets, but that shouldn’t stop some of these elements being replicated. Our high streets need to plan their identity and shape their retail offer accordingly. They need leadership, business plans and day-to-day delivery.”

2.54 It is this *managed* experience delivered by a shopping centre that continues to prove attractive to customers. Therefore, as consumers continue to seek out high quality shopping experiences the growth and success of prime shopping centres is set to continue. In consequence town centre managers and local authorities will need to continue to monitor the impact of the draw of such centres, whether within their District or within adjoining authorities, may have on the health of their own town centres.

⁴⁵ Portas Review – An Independent review into the future of our High Streets’, Mary Portas 2012

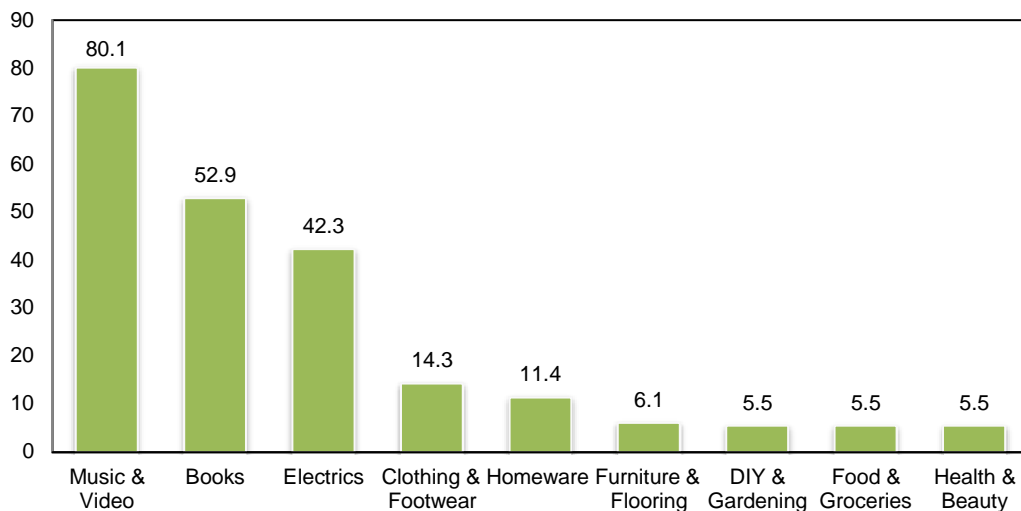
2.55 However, as clarified in Experian’s October 2015 Retailer Planner Briefing Note, as people work longer hours the idea of completing a weekly shop at an out-of-centre superstore had become less attractive⁴⁶. As we have addressed earlier in this section, the tendency towards smaller and more regular shopping trips has risen in recent years.

Growth in E-tailing (or ‘E-Commerce’)

2.56 As has already been established in the preceding sections, the rise of “E-tailing” has significantly altered the way in which the average consumer makes purchases across multiple sectors. Between 2008 and 2014, online sales as a proportion of total retail spend (excluding fuel) rose by more than 2.5 times – from under 4.7% in June 2008 to 11.7% in mid-2015 (as reported by the Office for National Statistics (ONS)⁴⁷. The most recent data from the Office for National Statistics (ONS) on Retail Sales (published in March 2016)⁴⁸ identified that the amount spent online accounted for 13.2% of all retail spending (excluding fuel), a further increase from the previous year.

2.57 In the current retail environment, reports on “E-tailing” suggest it accounts for one in every five to ten pounds that are spent in the UK⁴⁹. To keep up with the spending patterns of the typical consumer, almost all retailers now have an online presence. Over time online shops are becoming more and more advanced and easy to use. This supports the growing attraction for consumers to make their purchases online.

Figure 2.2 | Online Sales Penetration by Sector % (2013 data)



Source: Verdict and SAS – How the UK will shop: 2013

⁴⁶ ‘Retail Planner Briefing Note 13’ Experian, October 2015

⁴⁷ ‘Retail Planner Briefing Note 13’ Experian, October 2015

⁴⁸ ‘Statistical bulletin: Retail Sales’ ONS, March 2016

⁴⁹ ‘UK online retail sales to reach £62.7bn in 2020’, Verdict Retail, 17 September 2015

- 2.58** It is important to acknowledge that there is a substantial variation between the kinds of purchases that are most likely to be made online. The Office for National Statistics (ONS) report that 4.4% of all food purchases were made online in March 2016, whereas 11.5% of all 'textile, clothing, and footwear' purchases and 8.8% of 'household good purchases' were made online⁵⁰. Figure 2.2 illustrates the penetration of online sales by sector based on 2013 data. Most notable is the large proportion of music and video, books and electrics that are purchased online.
- 2.59** The popularity of making online purchases is predicted to not only continue but to grow. Experian predict that by 2020 online (non-store) purchases will account for 17.8% of total retail expenditure, rising to 19.9% in 2035⁵¹. This is a significant increase in contrast to the March 2016 Office for National Statistics (ONS) figure of 13.2%. However, it is important to recognise that the increasing internet user base which drove the significant leaps in online sales observed each year from the mid-2000s will no longer be the key contributing factor as 88.5% of the UK population are now internet users (or 57.3 million people). Nevertheless, growth is expected to be maintained, although through new technology such as mobile phones and tablets.
- 2.60** In addition, a more co-ordinated approach to retail offers is expected with the online and physical world working together – an approach which is coined “omni-channel”. Indicative of the relationship between an online retail presences producing in-store purchasing is research produced by Deloitte in 2015, which estimated that digital technology influenced 33% of in-store retail sales in the UK in 2014, equivalent to £100 billion⁵². In future, Deloitte predict this will continue to grow with 50% of all in-store purchases being influenced digitally at the end of 2015.
- 2.61** The rise in popularity in 'click and collect' is another example of online influenced sales resulting in visits to a physical store. According to Verdict, 68% of online shoppers in the UK make use of 'click and collect' services⁵³. Deloitte predicted that at 2015 the number of 'click and collect' locations will reach half a million, representing a 20% increase from 2014.
- 2.62** In summary, the rise of the online retail world is undeniable. As the influence of “E-Commerce” continues to grow, we can expect retailers to react and start prioritising how they will make sure the relationship between real world retail stores and their online presence become more integrated.

⁵⁰ 'Statistical bulletin: Retail Sales' ONS, March 2016

⁵¹ 'Experian Retail Planner Briefing Note 13', Experian, October 2015

⁵² The Deloitte Consumer Review (2015) – Digital Predictions 2015

⁵³ Verdict Retail Online, retrieved on 2 May 2016

Trends in Leisure

- 2.63** Leisure is often considered a discretionary activity, and as such consumer spending on leisure is greatly influenced by the economic climate and in particular average levels of disposable incomes. However, when assessing the average spend of UK households on leisure activities it becomes clear that, even in light of an economic downturn, consumers in the UK have shown a growing desire to engage in leisure activities.
- 2.64** Figure 2.3 illustrates changes in UK average weekly household spending on leisure before the recession (2006), during the recession (2011) and after the recession (2014). ONS have adjusted all the figures to strip out the effects of inflation, so that true like-for-like comparisons can be made.

Figure 2.3 | ONS Weekly Household Spending Data on Leisure Items

Leisure Item / Activity	2006	2011	2014
Sports admissions, subscriptions, leisure class fees and equipment hire	£5.80	£6.70	£6.90
Cinema, theatre and museums etc.	£2.00	£2.40	£2.80
Admissions to clubs, dances, discos, bingo	£0.60	£0.60	£0.50
Gambling payments	£3.60	£2.70	£2.90
Restaurants and café meals	£12.80	£14.70	£16.60
Take away meals/food and other snack food	£8.10	£8.40	£8.80
Total	£32.90	£35.50	£38.50

Sources: 'Family Spending, 2015 Edition', ONS, released on 8 December 2015
'Family Spending, 2012 Edition', ONS, released on 4 December 2012
'Family Spending, 2007 Edition', ONS, released on 28 January 2008

- 2.65** The most recent ONS data (for the 2014 year) identified that an average household would spend £38.50 on leisure activities, including; £6.90 on 'sports admissions, subscriptions, leisure class fees and equipment hire' and £2.80 on going to 'cinemas, theatres and museums. This is out a total of £531.30 spent on average per week by UK households. It is interesting to assess the data on average household spending from the Office for National Statistics (ONS) for years both preceding (2006) and during the recession (2011). The Office

for National Statistics (ONS) average household spending figures for 2011 identify that out of the average weekly spend of £483.60, households spent - £6.70 on 'sports admissions, subscriptions, leisure class fees and equipment hire', £2.40 on going to 'cinemas, theatres and museums'. What is more, Office for National Statistics (ONS) data from 2006 confirms that on average households spent £455.90 per week, and of that £5.80 was spent on 'sports admissions, subscriptions, leisure class fees and equipment hire' and £2.00 on the 'cinema, theatre and museums' etc. The significant increases in spending from 2006 to 2014 illustrate the popularity of spending on leisure activities.

- 2.66** Research completed by the Economic and Social Research Council assessing the diversity of uses within 1,100 centres and high streets during 2000 to 2006 (the years preceding the recession), provides a clear indication that during this time, when the economy was strong, the leisure service industry was thriving. They found that the total number of leisure service units within UK town centres increased by 23% between 2000 and 2006.
- 2.67** As evident when assessing consumer spending figures (recorded by ONS) as at 2014 the leisure industry had strengthened since previous years (2006). Mintel calculated that this industry was estimated as worth £80 billion in 2015, approximately 15% higher than the 2010 total expected worth⁵⁴.
- 2.68** A significant challenge that may soon face the industry is anticipated to occur in response to the introduction of the National Living Wage. From 1 April 2016, the UK government introduced a new mandatory National Minimum Wage (NMW) for workers aged 25 and above, initially set at £7.20 - a rise of 50p relative to the previous National Minimum Wage rate. That represents a £910 per annum increase in earnings for a full-time worker on the current National Minimum Wage. A National Minimum Wage rate of £6.70 continues to apply for those aged 21 to 24.
- 2.69** So, while the increased base level wage will improve living standards for low-paid workers, in the process it seems certain to push up leisure operators' wage costs, since they largely rely on unskilled workers.

Trends in Market Towns

- 2.70** For the purpose of this chapter it is important to outline that in the adopted and emerging Huntingdonshire Local Plan, Huntingdon, St Neots, St Ives and Ramsey are referred to as 'Market Towns'.

⁵⁴ 'Leisure Review', Mintel, October 2015

- 2.71** By definition a market town is the term for a key settlement which presently or historically had the right to host public markets at stated times. Although many still hold regular markets, their role has changed significantly, with many now functioning as visitor centres, employment bases or commuter settlements⁵⁵. Market towns occupy a distinctive category in the geographic structure of England, their notable geographical features often relate to being surrounded by farmland, having a market place where roads meet in the town centre and/or acting as a bridging point over rivers.
- 2.72** The Commission for Rural Communities (CRC) confirmed that there is currently no agreed Government method for separating market towns from other urban areas. Under existing urban-rural definitions, settlements with populations of over 10,000 are classified as “urban”, the CRC says. This has meant there is very limited research on market towns.
- 2.73** The economic downturn had a notable impact on market towns. A study by ‘Action for Market Towns’⁵⁶ in 2009 looked at how the loss of any national multiples present in market towns (such as Woolworths) had notable impacts on other independent retailers, with shop closures leading to increased vacancy rates throughout rural centres. Nevertheless, the impact of the recession on market towns / rural centres was seen to be balanced out slightly by the increased trend of people holidaying in the UK during the recession.
- 2.74** More recent research shows that we are now working towards a ‘village revival’. A report by Strutt and Parker⁵⁷ suggests ‘creeping trends’ reveal that people are increasingly locating towards rural areas. The ‘Housing Futures’ report released by Strutt & Parker (2016) shows that more than 20% of people planning on moving home would like to live in a village, 14% a market town and only 12% either a big city or a suburb. The report outlined that ease of access is an important issue for respondents intending to move to rural locations/market towns, with 60% wanting to be able to walk to shops, 48% to local transport and 45% to medical facilities. This also reflects attractive lifestyle changes such as the increase of ‘working from home’ as well as the rising popularity of ‘top up shopping’.
- 2.75** In April 2015, Knight Frank reported that a wave of people were cashing in on the high values and high demand for homes in London and moving out to the home counties. This is also being exacerbated by the increase of Londoners in search of a second home⁵⁸. This is reflected in the increasing house prices within market towns. Figure 2.3 shows British market towns with the greatest house price rises from 2013 – 2014, illustrating how sought-after the

⁵⁵ Market Towns, Fit for the future, Rural services Network 2012

⁵⁶ Actions for Market Towns - 2009

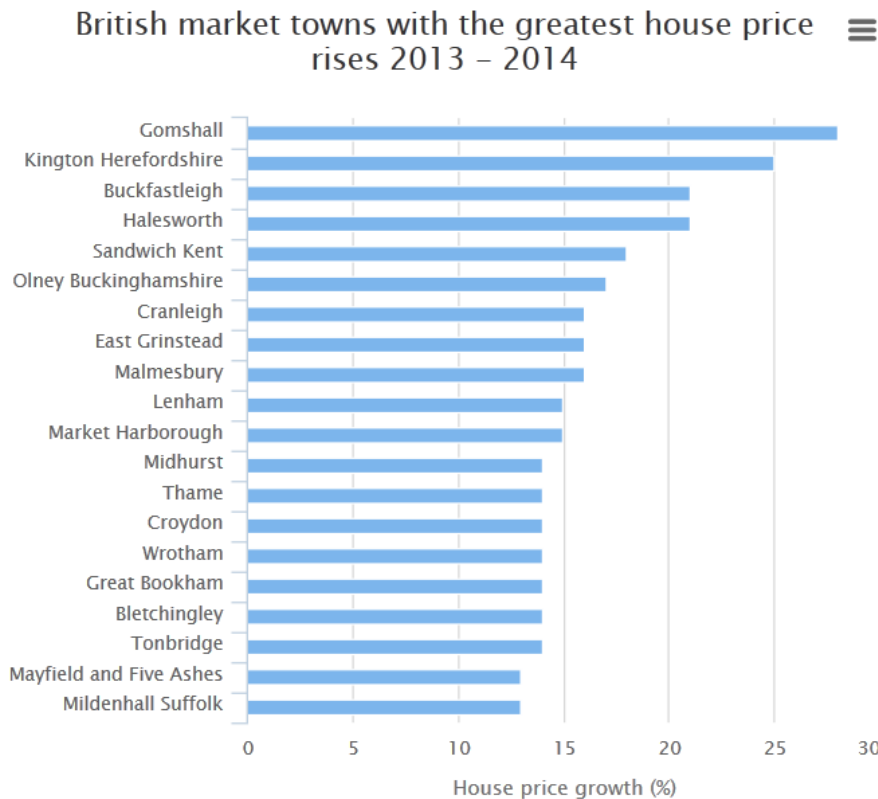
⁵⁷ The Village Revival, Housing Futures-2016

⁵⁸ Britain’s most Popular Market Towns, The Daily Telegraph

tag “market town” has become.

- 2.76 Figure 2.4 clearly illustrates a steady rise in the house prices of Market Towns from 2013 – 2014. This is backed up by research from Lloyds Bank in 2015, which showed that the average price of a property in a market town was £25,000 above the UK average.

Figure 2.4 | Rise in House Prices Market Towns 2013-2014



Source: *The Daily Telegraph – Britain’s most popular market Towns: 2015*

- 2.77 More localised housing data published in May 2016 by Hometrack⁵⁹ compares local housing market trends against those for East of England and the UK. Figures showed that from March 2015 to March 2016 the average house price (based on sales only) in Huntingdonshire District rose from £233,688 to £254,637, equating to a £20,949 increase over the 12 months. This was a much larger increase than seen in the UK which averaged a £12,168 increase over the same period. In addition, data showing the average time taken to sell a property in Huntingdonshire shows that, whereas in February 2015 it took an average of 9.1 weeks to sell a property, in February 2016 it took an average of just 3.9 weeks. When compared to the UK, where in February 2015 it took an average of 9.4 weeks to sell a property, dropping to 7.7 weeks in February 2016, it suggests that Huntingdonshire is a

⁵⁹ Housing Market Bulletin for Cambridge Sub Region – Hometrack April 2016

sought after place to live and reflects the increasing desirability of living in the Market Towns within the District.

Reduction in Multiple Retailers in Market Towns

- 2.78** Historically there has been a spatial shift in the location of comparison shopping with purchases becoming increasingly concentrated in larger centres⁶⁰. This has also led the role of multiples to become more dominant and challenges market towns to ‘maintain retail competitiveness’. In convenience shopping, it is also apparent that the big four major supermarkets are taking an increasing share of expenditure and becoming a determining factor in the success of a centre. This can lead to leakage of trade due to residents of market towns out shopping and the reliance of ‘top up’ shopping where people tend to go for small-scale food shopping trips or more basic service trips. The lower number of national multiples present in market towns is often reflected by a higher number of independent stores, with many supplying niche items that would often require a ‘special trip’ (e.g. antiques).

Rise in Charity Shops

- 2.79** As part of the economic downturn, the UK saw a rise in the number of charity shops in the high street. With reports outlining that Britain’s credit crunch triggered a 30% increase in the number of charity shops in the high street⁶¹. This trend is often exaggerated in market towns particularly due to the loss of many national multiples. It is very hard to control the take up of charity shops as in most cases the change of use from a retail unit to a charity shop does not require change of use. Furthermore, it is an attractive and cheap option for landlords who can have vacancies taken up as well as avoid paying the business rate.

Market Trading

- 2.80** A report produced for the National Market Traders Federation in 2012, confirms that assessing the relative impact of national trends on market trading is extremely difficult, owing to the lack of comparable national –level time series data. However, available information shows that in previous years, the number of traders in traditional markets has shown some considerable decline⁶². Figures show that in 2009 there were an estimated 38,100 traditional market traders in the UK, a 14% reduction since 2004 when there were an estimated 44,500 market traders. A report in 2009, by the National Association of British Market Authorities (NABMA, suggested that 25% of the UK’s local markets would close by 2020⁶³ reflecting the

⁶⁰ Market Towns: Roles Challenges and prospects (2007)

⁶¹ This is money article, August 2013

⁶² Retail Markets in the UK-2012

⁶³ National Association of British Marketing Authorities 2009

notable decline in high street shopping. However, findings from NABMA in 2013 showed that the markets sector was more than holding its own with 65% of NABMA members reporting stall holder numbers up, 57% reporting higher footfall, and 58% reporting profits either up or stable, year-on-year.

- 2.81** NABMA consider this increase to be attributed to the combined effects of the success of local farmers markets, with the democratisation of foodie culture and growing interest in local producers, (see paragraph 2.16) as community spirit has been re kindled, in part, by the recession⁶⁴.

Summary

- 2.82** The retail market has experienced significant changes in recent years. The prevailing retail environment continues to be volatile and unstable. In response to the unpredictability those operating in the market are forced to adapt quickly or otherwise face failing profits.
- 2.83** Following the economic downturn (2008 – 2013), 2016 has brought a return to economic conditions more akin to pre-recession times. The evolution of e-tailing continues to impact on the high street, however the retail industry is increasingly embracing innovative omni-channelling strategies. These are supported by online-influenced sales providing an opportunity for town centres to regain some of the custom they have lost.
- 2.84** It is apparent that differing retail trends are visible in market towns. While prominent factors (e.g. market trading, mobility) have been addressed in this chapter, it is clear that fortunes of market towns nationally vary widely.
- 2.85** Although some market towns suffered during the recession, particularly due to the loss of national multiples which often acted as anchor stores, they too are considered to be on the rise. This is due to a 'rural life' being increasingly sought after as well the increased trend of 'top up shopping' which is the life-line for many shops throughout market towns.

⁶⁴ Independent Online – September 2014

3.0 Planning Policy Context

Introduction

- 3.1** This Nexus Retail and Commercial Leisure Needs Assessment provides evidence that will support and inform the production of the emerging Huntingdonshire Local Plan (to 2036). As such, it is important to understand how the adopted and emerging national planning documentation may influence local plan policy, in particular those policies that relate to retail.
- 3.2** The following section of the Retail and Leisure Study establishes the planning policy context for the Study Area (refer to Figure 5.2 in Section 5 which illustrates the boundary of the identified Study Area, also included in a larger format at **Appendix 1**). Relevant documents from the Huntingdonshire District Council Development Plan, in addition to associated supporting documents, studies, and consultation documentation have been reviewed and a summary is provided below.

National Planning Policy Framework

- 3.3** The National Planning Policy Framework (NPPF) was published on 27th March 2012, coming into force with immediate effect for plan-making and development management decisions. Subsequent to this, the National Planning Policy Guidance (NPPG) was produced and published on 6 March 2014 as an online tool to support the implementation of the NPPF.
- 3.4** It is the NPPF that provides the national policy against which all planning applications should be considered. The NPPF is pro-growth with a “presumption in favour of sustainable development”. It effectively instructs decision makers to make positive decisions and support development unless there are clear adverse environmental, social and/or economic impacts.
- 3.5** The NPPF directly addresses economic development and acknowledges how planning can proactively drive and support economic development and in turn deliver homes, business, industrial units, infrastructure and thriving local places that England needs. Further, the NPPF emphasises that every effort should be made to objectively identify and then meet business development needs.
- 3.6** The NPPF stresses the Government’s commitment to securing economic growth in order to create jobs and prosperity. Paragraph 17 asserts the planning system should do everything it can to support sustainable economic growth. Additionally, Paragraph 19 explains significant weight should be placed on the need to support economic growth through the planning system and that planning should operate to encourage development and not act as an

impediment to sustainable growth. Paragraph 20 details that local planning authorities should plan proactively to meet the development needs of business and support a “21st century economy”. Further to this, Paragraph 21 explains that investment in business should not be over-burdened by the requirements of planning policy.

- 3.7** To ensure the continued vitality of town centres, Paragraphs 23 to 27 of the NPPF promote and support new development and investment within the settlement boundaries of town centres, recognising that town centres are the heart of communities. Where town centres are in decline, the NPPF directs local planning authorities to plan positively for their future to encourage economic activity.
- 3.8** The NPPF recognises the need for local authorities to promote the vitality and viability of their towns and cities through the promotion of competition and growth management. Specifically, Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:
- a. Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
 - b. Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
 - c. 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;
 - d. Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
 - e. Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
 - f. 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;

- g. 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;
- h. Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- i. 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
- j. Where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

3.9 Furthermore, Paragraph 24 requires local planning authorities to enforce a sequential approach when assessing planning applications for main town centre uses that are not in an existing centre or in accordance with an up to date Local Plan. To do this, local authorities should require applications for main town centre uses to be located in town centres, then in edge-of-centre locations and only if suitable sites are not available should out-of-centre sites be considered. When reviewing edge-of-centre and out-of-centre proposals, they should give preference to accessible locations well connected to the town centre.

3.10 Paragraph 26 specifies that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up to date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq m. The impact assessment should assess – (1) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal, and (2) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made.

3.11 In summary, the NPPF endorses a 'town centre first' approach to all retail activity (including leisure). It stipulates that where retail and leisure proposals cannot be accommodated within, or, adjacent to the town centre applicants have to demonstrate through the application of dual impact test and the sequential test that the development will not impact negatively upon the vitality and viability of town centres.

Ensuring the Vitality of Town Centres Planning Practice Guidance

- 3.12** National Planning Practice Guidance (referred to as the NPPG) entitled 'Ensuring the Vitality of Town Centres' was published in March 2014 and replaced the previous Planning for Town Centres Practice Guidance. The online tool provides a succinct synopsis of how retail and main town centre planning policy should be applied in practice.
- 3.13** In short, the specific objectives of the NPPG remain similar to those of its predecessor. For example, it directs local planning authorities to plan positively and support town centres. In addition, it sets out objectives that aim to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.
- 3.14** In addition to the enforcement of a 'town centre first' approach in order to meet local needs, the NPPG sanctions this should be delivered through a positive vision or strategy which is communicated through the development plan. In summary, local authorities should use development plan documents, policies and supporting guidance documents to address the following matters:
- a. The appropriate and realistic role, function and hierarchy of town centres in the area for the duration of the plan period. This should involve an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
 - b. Encapsulate a clear vision for the future of each town centre and the most appropriate mix of uses;
 - c. Ability for the town centre to accommodate the scale of assessed need through new development;
 - d. Timeframe for the delivery of new retail floorspace;
 - e. Any other complementary approaches which are necessary or appropriate to enhance the town centre to deliver the vision for its future; and
 - f. How the car parking provision can be enhanced in order to encourage town centre vitality.
- 3.15** Of specific relevance to this Retail and Leisure Study, Paragraph 005 categorises a series of key indicators to be used when assessing the health of a centre over time. It is these indicators that we have based our health checks of the vitality and viability of Huntingdonshire's centres on, as set out in detail in Section 5 of this Report.

- 3.16** Paragraph 005 also explains that it is often the case that successful town centre regeneration initiatives involve a range of improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms, rather than being purely led by retail schemes or focused on substantial new development.

The Portas Review - An Independent Review into the Future of Our High Streets

- 3.17** The Portas Review was published in December 2011 and since that time has been referenced as a key guiding document for town centre planning policy and regeneration efforts. The Review was undertaken by Mary Portas, as an independent adviser and retail expert, and assessed, on behalf of central Government, the state of Britain's high streets and town centres.
- 3.18** The review provided a critical assessment of the factors contributing to a third of high streets degenerating or failing. The review provided an analysis as to why over the previous decade out-of-town retail floorspace had increased by 30%, while in town floorspace had actually shrunk by 14%. As part of the Review Portas made 28 recommendations, including actions that Government, businesses and other organisations should take in order to bring back life into their high streets and town centres. Portas put out a challenge to re-imagine them as social hubs, not only just for shopping but also for learning, socialising and fun.
- 3.19** The Government published a response to the Portas Review in March 2012. The response acknowledged that in retort to the challenges being faced by the UK high street, including out-of-centre retail development and online retailing, the high street must provide something new and different for its visitors. As part of this response, the Government acknowledged a number of recommendations, including:
- i. Introduction of Town Teams (defined by Portas to be visionary, strategic and strong operational management teams for high streets) – Town Teams should not restrict their imagination;
 - ii. Funding for pilot areas (known as Portas Pilots) which are judged to have the best concepts for town centres and high streets improvements;
 - iii. A £10 million High Street Innovation fund allocated to councils in areas blighted by empty voids,
 - iv. Support for a new National Market Day to be held on 23 June; and

- v. £500,000 investment into the development of new Business Improvement Districts.

- 3.20** It is interesting to look back on this response now, given a number of these recognised initiatives are no longer being actively pursued by the Government.
- 3.21** In summary, the Government's response sought to encourage and motivate local planning authorities to put concepts for town centre enhancement and improvement into place. The overriding goal local authorities were tasked with is to induce their residents back into the town centre, in both the daytime and night-time hours. However, given on-going challenges and competing priorities for both the Government and local authorities a number of the schemes are not currently considered feasible.

Relaxation of Permitted Development Rights

- 3.22** Over the past few years the Government has supported the nation's town centres by adopting flexible policies that allow the diversification of town centre units.
- 3.23** In May 2013 changes were made to the Town and Country Planning (General Permitted Development) Order 1995 in response to the Portas Review's (see above) recommendation to make it easier to convert surplus space in order to provide for the effective re-use of town centre units. The May 2013 amendments provided for a period of three years during which the change of use of B1 offices to C3 residential uses could take place without the need for formal planning permission. Under this order, applicants are simply required to apply for a prior approval notice from the relevant local planning authority.
- 3.24** The 2013 Order also provides for the temporary change of use (for up to two years) of uses falling within Use Classes A1, A2, A3, A4, A5, B1, D1 and D2 to uses falling within Classes A1, A2, A3 and B1. Prior approval for this type of use would be given when it relates to no more than 150 sq m of floorspace and the temporary provision has not formerly been relied upon.
- 3.25** In April 2014, permitted development rights were further extended to provide for certain additional changes of use without the need for formal planning permission. The changes introduced two new classifications of permitted development for commercial premises, as follows:
- a. The first provides for the change of use of premises and land from Use Class A1 to use as a 'deposit taker' (effectively comprising banks, building societies, credit unions and friendly societies).

- b. The second provides for the change of use from Use Classes A1 and A2 to C3 residential.

3.26 Again there are certain restrictions as to where and when the rights can be exercised. Most notably, the change of use must relate to no more than 150 sq m of floorspace.

3.27 Further extensions to the permitted development rights came into force two years later on 4 April 2016. The key changes introduced by this 2016 Order include:

- a. Removal of the 31 May 2016 deadline altogether (being the end of the previously identified three year period), thereby making the permitted rights **permanent**; and
- b. Allowing laundrettes to change to residential uses.

3.28 The intended consequence of such measures is to secure the redevelopment and reuse of premises and diminish long-term vacancies. To this end, the rights are expected to support town centres to be comprised of well-utilised units

Huntingdonshire Development Plan

3.29 The current Huntingdonshire Development Plan is made up of the following relevant documents:

- The Local Plan (adopted 1995);
- The Local Plan Alteration Part 1 (policies) and Part 2 (inset maps). The alteration was adopted in 2002 and only contains policies regarding settlement strategy and housing, which replaced some of those in the Local Plan;
- Core Strategy (2009);
- The Huntingdon West Area Action Plan (2011) which covers the redevelopment of the north west of Huntingdon Town Centre; and
- St Neots Neighbourhood Plan (2016).

3.30 Paragraph 215 of the NPPF explains that due weight can be given to relevant policies in the above plans, according to their degree of consistency with the NPPF. The closer the policies in the plans are to the policies in this National Framework, the greater the weight that may be given.

- 3.31** A replacement Local Plan is being prepared for Huntingdonshire District which will promote growth through to 2036. The Plan has a housing target growth of at least 21,000 new dwellings between 2011 and 2036. The new plan will replace all existing development plan documents, including the Local Plan (1995), the Local Plan Alteration (2002), the Core Strategy (2009) and the Huntingdon West Area Plan (2011). The new plan will set out the strategy for development in Huntingdonshire, including detailed policies for managing development and details of sites allocated for development to meet the future needs of the District.
- 3.32** Initial Issues and Options Consultation was carried out from May – June 2012 with further consultation carried out in summer 2013. Consultation on additional sites was undertaken from May to November 2014 and further targeted consultation between January to March 2015. The Council are now in the process of finalising their evidence base for the proposed submission local plan with a Regulation 19 consultation anticipated in Spring 2017. It is currently proposed that the plan will be submitted to the Secretary of State in late 2017, with estimated adoption in mid-2019.
- 3.33** Relevant Policies within the existing Local Development Plan, as well as those within the emerging Local Plan, are summarised below.

Huntingdonshire Local Plan 1995

- 3.34** The Huntingdonshire Local Plan (1995) provides a detailed framework to guide both development and conservation in the area up to 2001.
- 3.35** The plan outlines that the Town Centres of Huntingdon, Ramsey, St Ives and St. Neots are the principal centres of economic and cultural activity in the District. The local plan provides the policy base to support this role for the town centres.
- 3.36** The ‘shopping strategy’ sets out the policies and general guidelines for the development of shopping and retail warehouses in market town centres, out of town centres and villages and includes the following relevant policies;
- Policy S2 ‘*Location and design criteria for shopping proposals*’;
 - Policy S6 ‘*Local shopping provision in new residential areas*’;
 - Policy S7 ‘*Local shopping proposals in existing residential areas*’;
 - Policy S10 ‘*Protection and enhancement of town centre viability and vitality*’;

- Policy S12 '*Retention of existing retail units in the town centre*';
- Policy S13 '*Primary shopping frontages of market towns*';
- Policy S14 '*A4 uses (food and drink) assessment criteria*';
- Policy S16 '*Local shopping proposals in built up areas*'; and
- Policy S17 '*Retention of rural shopping facilities*'.

Core Strategy 2009

- 3.37** The Huntingdonshire Core Strategy was adopted in 2009 and sets out the strategic spatial planning framework for the District. Policies within the Core Strategy (2009) superseded those within the Local Plan Alteration (2002).
- 3.38** The spatial vision for Huntingdonshire seeks to protect the traditional hierarchy of Market Towns. The Core Strategy outlines that, market towns will be encouraged to respond to pressure from competing centres outside of the district, in order to further strengthen the District's economy, provide more choice and reduce the need to travel.
- 3.39** The Core Strategy Settlement Hierarchy, outlined in Policy CS3, identifies Huntingdon, St Neots, St Ives and Ramsey & Bury as 'Market Towns' in which development schemes of all scales may be appropriate within the built up area.
- 3.40** Policy CS8 'Retail and Town Centre Uses' outlines that at least 20,000 sq m of comparison floorspace and 4,000 sq m of convenience floorspace will be provided in the District 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 9,000 sq m of comparison floorspace will be located in Huntingdon, concentrated in the town centre, with priority given to further development and improvement 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 Huntingdon West Area Action Plan);
 - At least 9,000 sq m 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 significant mixed use urban extension on greenfield land to

the east of the town;

- At least 2,000 sq m of comparison floorspace, located at St Ives concentrated in the town centre; and
- At least 4,000 sq m of convenience floorspace, primarily in town centres across the District.

3.41 The above policy is based on forecasts made in the Huntingdonshire Retail Assessment completed in September 2005 and updated in 2007 study.

Huntingdon West Area Action Plan (2011)

3.42 The Huntingdon West Area Action Plan (HWAAP) was adopted by the Council in February 2011 and covers approximately 300 hectares of land west of Huntingdon's town centre. Relevant policies to this retail study include;

- **Policy HW4** – Development sites in the George St/ Ermine St area of approx. 6ha will be developed incorporating 5,350 sq m of retail, complementary to the continuing vitality and viability of the town centre that does not jeopardise the delivery of further redevelopment at Chequers Court.
- **Policy HW 11** – The timing of the development in the George St/ Ermine St area will be determined by the completion of the link road. Retail development in the George St/ Ermine St will be dependent on the proposals being complementary to plans for the town centre, in terms of the mix of retail activity, and that the selected sites are appropriate in urban design terms and can demonstrate that they are well connected to the town centre.

Emerging Local Plan

3.43 The Council's most progressed version of the emerging Local Plan is the Draft Local Plan, published for targeted consultation in January 2015.

3.44 The development strategy in the emerging plan outlines the following hierarchy for the District:

- Spatial Planning Areas;
- Key Service Centres; and

- Small Settlements.

3.45 Policy LP 8 ‘*Development in The Spatial Planning Areas*’ identifies four spatial planning areas (SPA’s) of Huntingdon, St Neots, St Ives; and Ramsey.

3.46 To achieve the spatial strategy outlined in Policy LP8, a series of sites are allocated for development including;

- **Huntingdon SPA:** Allocations will be made for new development including a major growth area at Alconbury Weald detailed below.
- **St Neots SPA:** A major growth area is proposed to the east adding to the Loves Farm development. Additional shops and related town centre uses in the town centre are encouraged to ensure that it is attractive to the growing population.
- **St Ives SPA:** A smaller number of land allocations are planned together with a growth area, ‘St Ives west’, which links with recent development in the area known as Green Acres and Slepe Meadow. The policy aims to encourage sustainable economic growth and support new investment with the St Ives SPA. Some new investment is expected in the town centre in order to ensure that it remains as an attractive centre for daily needs as well as specialist interest.
- **Ramsey SPA:** Due to Ramsey’s limited sustainability, the focus of planning policy is on ensuring that the area is allowed to improve and redevelop over time, making the best use of existing buildings, previously developed land and other resources. Allocations planned for new development reflect existing opportunities within the area. A range of uses are encouraged within Ramsey Town Centre so that it can continue to offer a range of retail and commercial businesses.

3.47 In addition, a central part of the strategy is proposed development in three Strategic Expansion Locations. Due to the scale of potential development being proposed and the nature of these locations they are presented together ahead of the development sites (outlined above).

- **Alconbury Weald (Proposed Allocation SEL1)** –the former airfield adjoining land to the north of Huntingdon, close to Great and Little Stukeley, is proposed to be allocated for a mix of uses and outline planning permission has been already been granted. The site lies adjacent to the East Coast Mainline railway and could include a new railway station. It is proposed that the site will include;
 - Approximately 5,000 homes;

- At least 29,000 sq m business floorspace;
- Approximately 7,000 sq m gross retail floorspace (class A1) to be contained within defined centres to comprise approximately 4,500 sq m shop floorspace (class A1) with a maximum of 1,500 sq m floorspace in any one store.
- **Eastern Expansion, St Neots (Proposed Allocation SEL2)** – The eastern expansion of St Neots, on land to the east of the railway line, is proposed to be allocated for mixed use development. A planning application is subject to appeal as at February 2017 due to viability issues affecting the provision of affordable housing. It is proposed that the site will include;
 - Approximately 3,820 homes;
 - Approximately 22 ha of employment land;
 - A local centre of some 3 ha containing offices (class ‘B1a’ uses), approximately 4,000 sq m of retail floorspace (class ‘A1’) including a supermarket (class ‘A1’) with a maximum retail floorspace of 3,000 sq m and other retail (classed ‘A2’ to ‘A5’) and ancillary uses appropriate to the scale of development within the centre;
 - A neighbourhood centre with approximately 200 sq m of retail floorspace (class A1) and other A2 to A5 ancillary uses; and
 - Proposed retail shops will be appropriate to the area and complementary to the continued vitality and viability of the town centre.
- **Wyton Airfield and Wyton on-the-Hill** – Land at Wyton Airfield/ Wyton – on – the – Hill is proposed to be allocated for a mix of uses subject to satisfactory evidence concerning the transport and other infrastructure implications of the proposal and the viability of their delivery. The aim is for Wyton-on-the-Hill to become a much more sustainable settlement and more cohesive community. It is proposed that development will comprise;
 - Approximately 4,500 homes;
 - Approximately 10ha employment land;
 - A single centre to include a maximum of 4,800 sq m retail floorspace (class

'A') to comprise approximately 3,000 sq m shop floorspace (class 'A1') with a single supermarket store with a maximum 2,000 sq m floorspace; and

- Appropriate services (A2), restaurants (A3) and takeaways (A5) within a defined centre.

3.48 Other policies within the emerging plan that are relevant to this retail study include;

- i. **Policy LP23** *Town Centre Vitality and Viability* outlines that the town centres of Huntingdon St Neots, St Ives and Ramsey will be the major focus for all new main town centre uses. The policy goes on to define Primary Shopping Areas and Shopping Frontages.
- ii. **Policy LP 20** *'Local Services and Facilities'* outlines the importance of local services and facilities in market towns and protects their vital role in promoting sustainable communities.

St Neots Neighbourhood Plan

3.49 The St Neots Neighbourhood Plan was made in February 2016 and now forms part of Huntingdonshire's adopted Development Plan.

3.50 One of the Neighbourhood Plan's five main objectives is to '*encourage the growth of retail, leisure and community facilities*'. In doing so development should aim to;

- Enhance the appearance and historic character of the Town Centre;
- Utilise the historic character of the Town Centre to showcase the town's heritage
- Promote the Town Centre as the destination of choice for retail leisure and community activities;
- Enhance the leisure and entertainment offer throughout the town; and
- Promote the river as a low impact leisure resource.

3.51 Policy A1 of the St Neots Neighbourhood Plan states that, 'Proposals in the town centre that create new or enlarged units will be expected to contribute to the improvement of the Town Centre's public realm where viable'.

3.52 Supporting text to this policy affirms that every opportunity should be taken to improve the public realm of the Town Centre. An improved public realm will make the Town Centre more

attractive and encourage more visitors, thus improving its viability.

- 3.53** Policy PT3 resists the loss of car parking and motor cycle spaces in the town centre, outlining that support would be given to a multi storey car-park provided that it is of an appropriate mass, scale and design. Further, Policy PT3 supports the installation and improvement of CCTV in the Town Centre as part of any car park improvements.
- 3.54** Policy SS1 supports the expansion of the Town Centre and Town Centre uses. The policy goes on to say that, proposals for new town centre uses within the Town Centre will be favourably considered. The Town Council will particularly favour fashion shops, food/ drink establishments, affordable franchises and supermarkets and increased use of the Market Square for markets. In addition, proposals for uses covering two or more existing units (the merging of units) will be favourable considered.
- 3.55** The Neighbourhood Plan clearly summaries that the Town Council wish to see the Town Centre expanded to increase its retail offer. Where land become available within the Town Centre, priority will be given to retail use and, as outlined in Policy SS1, there is a preference towards fashion, affordable franchises and supermarkets, which are considered to be 'much needed' in St Neots.

Evidence Base

- 3.56** As already referenced above, this Retail and Leisure Study will supersede the 2013 Retail Study, produced by Deloitte, which is an update of the 2010 Retail Study, produced by Roger Tym and Partners (RTP). Conclusions from both studies are discussed in the following section.

Huntingdonshire Retail Development Advice (2010 - Roger Tym and Partners (RTP))

- 3.57** The 2010 Retail Study contained a review of the local policy framework, an analysis of household telephone surveys, described current patterns of retail and leisure spending, (drawing on new telephone surveys of households across Huntingdonshire's overall catchment area), and an analysis of quantitative need and updated advice as to how the retail capacity should be met.
- 3.58** The study also considered development opportunities in the centres of Huntingdon and St Neots. Key findings from the 2010 Retail Study are set out below:

Conclusions in Relation to Retail Capacity

Comparison

- 3.59** At the time of the study it was concluded that, although the current level of comparison retention achieved by the catchment area (50.6%) is relatively healthy, this could be improved. The study suggests that, over the period 2009 to 2021, there is a requirement for up to an additional 17,200 sq m comparison sales area, increasing to 29,000 sq m in the longer- term period 2009 to 2026.
- 3.60** The study considered that there was a requirement for the provision of quality developments for higher value comparison retailers, and particularly clothing and shoes retailers in Huntingdon Town Centre. Additional fashion retail provision was also stated as welcome in St Neots, although Huntingdon was considered the priority, given it is the District's highest-order centre. Additional furniture, carpets and soft furnishings retailers also required across the District.
- 3.61** In their assessment, RTP concluded that additional comparison sales area floorspace requirements arising in the period 2009 – 2021 should be apportioned across the District as follows:
- Huntingdon: approximately 10,200 sq m (111,400 sq ft);
 - St Neots: approximately 5,200 sq m (55,700 sq ft);
 - Other locations in the overall catchment area: 1,700 sq m (18,600 sq ft); and
 - Total (all locations within the OCA): 17,200 sq m (185,600 sq ft).
- 3.62** Additional comparison sales area floorspace requirements, arising in the period 2009 to 2026, should be apportioned across the District as follows;
- Huntingdon: approximately 17,400 sq m (187,300 sq ft).
 - St Neots: approximately 8,700 sq m (93,600 sq ft).
 - Other locations in the OCA: 2,900 sq m (31,200 sq ft).
 - Total (all locations within the OCA): 29,000 sq m (312,000 sq ft).
- 3.63** It is noted that the above distribution differs from the comparison floorspace distribution set out in the Core Strategy. However, RTP conclude that the proposed level of growth at St Neots will be difficult to achieve due to the lack of suitable sites for development in and

around the town centre. As such, a greater proportion of floorspace was suggested to be directed to Huntingdon - the District's highest order centre, where there was more physical capacity than in St Neots.

- 3.64** It terms of qualitative needs in the comparison sector, RTP outlined that the priority must be to deliver new premises of the right size, configuration and trading environment, which are able to attract high-profile retailers.

Convenience

- 3.65** In relation to convenience floorspace the study concluded that, over the period 2009 to 2021, there was a quantitative requirement for up to 2,300 sq m of additional convenience sales area floorspace, rising to 4,100 sq m over the longer term period to 2026. There is also qualitative need for the provision of additional convenience retail floorspace in superstore format located to the south or west of Huntingdon. These figures take into account the level of over-trading identified by RTP, along with their recommendation that one of the Council's policy aspirations should be to increase the retention rate in the convenience sector.

- 3.66** It was noted that the scale of convenience retail floorspace requirements that RTP identified is more modest than the comparison sector. This is mainly due to the already healthy provision found in both St Neots and Huntingdon at the time of the study.

Development Opportunities

- 3.67** **Huntingdon** - At the time of the retail study, RTP concluded that the Chequers Court area in Huntingdon represented the best opportunity for a substantial comparison retail scheme in the District. Although the large area to the north west of Huntingdon Town Centre (Ermine Street/George Street) also offers potential for a significant amount of comparison development, RTP considered this a longer - term opportunity.
- 3.68** **St Neots** - RTP identify three sites in St Neots Town Centre with the potential for some form of retail development, including the TC Harrison Site, Tebbutts Lane Car Parks/ Moores Walk and Priory Lane Quarter and Waterfront.
- 3.69** At the time of the retail study, RTP concluded that St Neots was adequately provided for in terms of food and grocery stores. However, they identified scope for a new food store to the north east of St Neots in order to support the new district centre of the major urban extension.

Huntingdonshire Retail Study 2013 (Deloitte)

- 3.70** The 2013 Retail Study used the household survey data from the 2010 report and considered changes to the town centre performance and national shopping trends, provided an updated quantitative assessment of retail needs, and considered draft Local Plan allocations and policies.
- 3.71** Overall the study concluded that there was no substantive quantitative or qualitative need for additional retail development in the District, in addition to existing commitments and Policy Proposals over the short to medium term (until at least 2021).

Convenience

- 3.72** At the time of the retail study, it was concluded that no additional floorspace capacity could be supported within the District until 2026. By 2031 the floorspace capacity would rise to 1,992 - 4,494 sq m (net).
- 3.73** It is however noted that, there may be instances of localised qualitative convenience need in order to widen consumer choice and reduce potential over trading. For example, there were proposals for a Lidl in Huntingdon where, at the time, there were no 'discounter' food stores.

Comparison

- 3.74** Taking into account commitments at the time of the study, there was no additional floorspace capacity for comparison goods until 2026. The 2013 study concluded that by 2031 there would be a net floorspace requirement of 8,883 sq m.
- 3.75** It was noted that the Chequers Court development within Huntingdon Town Centre would be an important part of substantiating Huntingdon's role as the main comparison goods shopping destination within the District.
- 3.76** Furthermore, it was noted that the provision of new retail facilities, to serve new housing development, and in the expansion areas of existing settlements should be encouraged. However, these facilities should not compete in scale and offer with the existing four main town centres.

Summary

- 3.77** The NPPF recognises and stresses the importance of promoting the vitality and viability of town centres through a 'town centre first' approach to development and a defined retail hierarchy. Town centres play an essential contributing role in the nation's economy as well as acting as the heart of local communities – where both social and commercial exchanges

take place.

- 3.78** As a direct result of the NPPF coming into force, all planning applications for main town centre uses must provide a full assessment of the impact of the proposal on the vitality and viability of protected centres (for applications greater than 2,500 sq m, or a locally set threshold). It is on the basis of this impact assessment that local planning authorities consider the overall impact of the planned development on their existing retail provision as well as pipeline retail developments.
- 3.79** The Council's current Local Plan, Local Plan Alteration and Core Strategy were all adopted prior to the enactment of the NPPF. Even so, they still comprise a number of planning policies that, by and large, comply with the guidance set out for local planning authorities by the NPPF as they relate to the promotion of town centres. Notably, the adopted Plans set out a hierarchy of the District Centres as well as identifying the Town Centre Boundaries, frontages to be protected for retail use, and policies that seek to promote town centre competitive performance.
- 3.80** The emerging Local Plan is currently being progressed and will eventually replace the current Huntingdonshire Development Plan. The emerging plan sets out a hierarchy of the District Centres as well as defining Town Centre Boundaries, Primary Shopping Areas and Primary Shopping Frontages for Huntingdon, St Neots, St Ives and Ramsey. The Local Plan also includes policies to protect the vitality and viability of the Market Towns.
- 3.81** Importantly, the plan also sets out the development strategy for Huntingdonshire District up until 2036, including three strategic expansion locations at Alconbury Weald, St Neots Eastern Expansion, and Wyton-on-the-Hill, which all include proposals for large scale retail development. These proposals will be taken into consideration later on in this study, when looking at the quantitative and qualitative retail need, and when identifying recommendations for the Council's future retail town centre and leisure strategy.

4.0 Assessment of Key Retail Centres

- 4.2 This section of the Retail and Leisure Needs Assessment details our analysis of the vitality and viability of Huntingdonshire District's Centres.
- 4.3 The analysis focuses on the four market towns of Huntingdon, St Neots, St Ives and Ramsey. These four market town centres perform an important role in Huntingdonshire, serving the needs of the local community and the wider district.
- 4.4 The physical extent of each town centre has been determined by the extent of Experian Goad Plan boundaries. This is standard Retail Study methodology and enables direct comparison with the 2010 Retail Study produced by Roger Tym & Partners. A direct comparison with the 2013 Study is not possible as Deloitte utilised a different definition of the town centre in each instance. We discuss this where it is relevant below.

Methodology

- 4.5 The National Planning Policy Framework (NPPF, March 2012) states that local planning authorities should:
- i. Set out policies for the management and growth of town centres over the plan period;
 - ii. Recognise town centres as the heart of their communities; and
 - iii. Pursue policies to support their viability and vitality.
- 4.6 Paragraph 23 of the NPPF recognises that town centres are the heart of communities and local planning authorities should pursue policies to support their viability and vitality, in addition to promoting competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of each town centre.
- 4.7 While the NPPF does not provide a list of criteria to be used to assess the health of a centre, the Government's 'Ensuring the Vitality of Town Centres' National Planning Practice Guidance (NPPG), March 2014) provides a helpful set of indicators. Further, the NPPG explains these indicators should be monitored on a regular basis in order to judge the health of a centre and its performance over time.

4.8 Below is a list of the indicators that have been used by Nexus to complete their assessment of the health of the Huntingdonshire centres:

- **Diversity of Uses** - Data on the diversity of uses in each of the town centres was collated during the Retail Surveys completed by Nexus in June 2016. The collected data includes the number, type and quantum of floorspace provided in these locations.
- **Proportion of Vacant Street Level Property** - Vacant properties were also identified during the June 2016 Retail Surveys.

The volume of vacant floorspace within a town centre can provide an indication of how it is performing. However, it is important to acknowledge that a degree of vacancy is inevitable and sometimes desirable. Some 'churn' is expected in the market as units alter and change, as new businesses enter a town and others leave. In this context, vacant units are commonly found in even the strongest of town centres.

Equally, a low vacancy rate does not necessarily mean a town centre is performing well; as the quality and performance of the occupied units may be relatively poor. For example, if a town centre is dominated by a high number of charity shops, while it may have a low vacancy rate, the town's overall attractiveness is likely to be poor and the town is probably facing decline.

- **Commercial Yields on Non-Domestic Property** - Whilst this can be an indicator of town centre performance over time, data on commercial yields in the District's centres is not publically available at this time.
- **Customers' Views and Behaviour** - Information on customers' views is based on the results of the comprehensive NEMS household telephone survey (completed in June 2016). These results provide an indication of how a centre is both used and viewed by local residents.
- **Retailer Representation and Intentions to Change Representation** - Information on the current strength of centres and retailer representation has been derived from Javelin Venuescore UK Shopping Venue Rankings, Experian GOAD Category Reports and from other published sources.
- **Commercial Rents** - Zone A rental data can provide information on historic trends, however, data on commercial rent is not publically available for the District's centres at this time.

- **Pedestrian Flows** - General footfall and pedestrian flows were observed by Nexus during site visits to the Huntingdonshire centres in June 2016. The centres were visited on different days of the week and at different times of the day. Therefore, Nexus was able to obtain a comprehensive understanding of pedestrian flows through observation at these varying times.
- **Accessibility** - Consideration of access to and around each centre was informed by the Nexus site visits. This was in addition to stakeholder engagement, results from the NEMS household telephone survey and a desktop review of data detailing access to public transport and parking facilities.

The accessibility of a centre is determined by the ease and convenience of access by a variety of transport means; including that which is provided to pedestrians, cyclists and disabled people – and the ease of access from the main arrival points to the principal attractions in the centre.

- **Perceptions of Safety and Occurrence of Crime** – General perceptions of safety were gathered during the site visits and from a review of existing data.
 - **State of Town Centre Environmental Quality** – Consideration of the quality of the buildings and public realm in each of the centres was informed by Nexus’s site visits to each of the centres and the NEMS household telephone survey.
- 4.9 The following sections of the report provide details of the Nexus assessment of the health of Huntingdonshire centres in respect to the above indicators derived from the NPPG.
- 4.10 Experian Goad plans, updated by Nexus, are provided for each town centre at **Appendix B**.
- 4.11 Goad plans are defined by Experian, and whilst they are broadly in line with Town Centre boundaries shown on Proposals Maps, they are not always identical.

Stakeholder Engagement

- 4.12 Nexus undertook stakeholder engagement with local stakeholders from all four centres to further understand local context and history. The following topics were covered during these meetings; the vitality and viability of the town centre, vacancies, mix of retail, parking, street environment, crime and security and the emergence of Town Centre events. The meetings with local stakeholders are discussed in the below sections.

Sub-Regional Hierarchy

- 4.13 The plan included as Figure 5.1 in Section 5 (and in a larger format at **Appendix A**) illustrates the location of the Study Area relative to the main settlements in the sub-region.
- 4.14 The Core Strategy (2009) defines the settlements of Huntingdon, St Neots, St Ives and Ramsey and Bury as 'market towns'. Although all four settlements are considered to be market towns, the plan suggests Huntingdon and St Neots, by virtue of their train links, are better able to accommodate development in a sustainable manner.
- 4.15 All four market town centres are located within conservation areas.
- 4.16 Figure 4.1 ranks the sub-region's principal centres based on the Javelin Venuescore UK Shopping Venue Rankings 2014/15. The index details from 2010/11 and 2013/14 are also shown as they represent the time during which the previous Retail Studies (discussed in Section 3) were completed.
- 4.17 Javelin Venuescore's index ranks 2,711 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the strength of their current retail provision. Towns and major shopping centres are graded using a scoring system taking account of the presence of multiple retailers in each location – including anchor stores, fashion operators and non-fashion multiples. It is important to acknowledge that the Venuescore index does not include an assessment of independent operators, or other town centre health indicators, identified in the NPPG i.e. these factors do not affect the score.
- 4.18 As illustrated in Figure 4.1, Huntingdon is the highest scoring of the four towns and classes as a sub-regional centre by Venuescore. The centre is ranked 356th of all the centres surveyed, dropping 40 places since 2010.
- 4.19 St Neots climbed 79 places from 2010 to 2013/14 but then dropped 18 places from 2013/14 to 2014/15. St Ives has not appeared in the Venuescore rankings since 2010 where it ranked 628. Ramsey does not appear in the rankings.
- 4.20 Cambridge (ranked 34th) is located approximately ten miles south east of Huntingdonshire district border, Peterborough (54th) 3 miles north and Bedford (119th) 8 miles south west of the border. Shopping patterns in the Study Area are therefore influenced to some degree by the greater strength, diversity and attractiveness of the retail offer at these higher-order centres.

Figure 4.1 / Comparison of Venuescores for Huntingdonshire Market Town Centres and Competing Centres

Centre	Classification	2014-2015 Score	2014-2015 Rank	2013-2014 Rank	2010 Rank	Market Position Classification	Market Position Index (Average 100)
Cambridge	Major regional	318	28	34	39	upper middle	128
Milton Keynes	Major regional	301	34	29	35	upper middle	114
Peterborough	Major regional (moved from regional to major regional from 2013-2015)	261	48	54	64	middle	99
Bedford	regional	186	105	119	130	Middle	92
Huntingdon	Sub regional	77	356	347	316	middle	90
	District						
Wellingborough	(moved from major district in 2014)	72	394	374	432	Lower middle	86
St Neots	Major district	66	437	419	498	middle	95
St Ives	n/a	n/a	n/a	n/a	628	n/a	n/a
Biggleswade	district	n/a	n/a	n/a	591	Lower Middle	n/a
Ramsey	n/a	n/a	n/a	n/a	n/a	n/a	n/a

Source: Venuescore, 2010, 2013/14, and 2014/15 (Centres in Huntingdonshire shown in bold)

Previous Studies

- 4.21 For the purpose of this assessment, comparisons have been drawn to the findings of the previous studies undertaken in 2010 by Roger Tym & Partners and in 2013 by Deloitte.
- 4.22 The town centre boundaries used by Deloitte in the 2013 Study were measured across larger areas and not just within the town centres. As such, it is not possible to make direct comparisons between the RTP and Nexus work in 2010 and 2016 (which share common town centre boundaries), and those arrived at by Deloitte in 2013.
- 4.23 The 2010 RTP study did include readily comparable data for Huntingdon and St Neots, but it did not include data for the market towns of St Ives and Ramsey. However, we have been able to source historical data from Goad (dated 2010) for these towns in order for comparisons to be made. Comparisons against the 2010 retail study enable us to gauge an understanding of the

change of retail composition that the centres of Huntingdon, St Neots, St Ives and Ramsey have undergone, over a longer period of time.

- 4.24 In the following sections we individually assess the vitality and viability of the four market towns based on a combination of: updated Goad assessments; Nexus health checks undertaken in June 2016; discussions with local stakeholders; and from the qualitative results of our household telephone survey where it considers peoples' likes and dislikes of each centre.

Huntingdon

Address High Street/ Chequers Court/ St Benedict's Court

Description Huntingdon is the largest retail centre in Huntingdonshire District in terms of retail floorspace. Out of the four centres, it has the most national multiple retailers which is reflected in the Venuescore rankings in Figure 4.1.

Huntingdon is located approximately 18 miles to the north-west of Cambridge and 26 miles to the south of Peterborough, which are both major regional centres.

Current Status Market Town Centre/ Sub Regional (Venuescore Classification)

Photos



Figure 4.2: The majority of Huntingdon High Street is pedestrianised.



Figure 4.3: The Falcon Pub has recently reopened on Market Hill.



Figure 4.4: Looking onto the pedestrianised area of the High Street from outside the Community Centre.



Figure 4.5: The newly refurbished Chequers Court (Phase 1).



Figure 4.6: Da Vinci's new wine bar at the Priory.



Figure 4.7: Sainsbury's supermarket fronting on to the new Chequers Court development.



Figure 4.8: St Benedict's Court offers a good circulation area with outside public art incorporated into a seating arrangement.



Figure 4.9: A fountain in St Benedict's Court is utilised as seating.



Figure 4.10: Gum targets located around the town centre encourage pedestrians to keep the streets clean and tidy.



Figure 4.11: Newtons Court shopping mews.

Figure 4.12 | Diversity of uses

Huntingdon	Units (no.) 2010	Units (%) 2010	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	12	6.7	12	6.9	21.7	8.6	15.2
Comparison	81	45.3	68	39.3	48.0	32.1	35.9
Service	57	31.8	68	39.3	22.8	47.7	39.0
Vacant	22	12.3	17	9.8	5.0	11.3	9.2
Miscellaneous	7	3.9	8	4.6	2.5	0.1	0.1
TOTAL	179	-	173	-	-	-	-

Overall Composition

Out of all four centres, Huntingdon has the highest Venuescore and is classed as a 'Sub Regional' centre. Whilst St Neots and St Ives have a greater number of retail units, this high score reflects the presence of Major Retailers (as defined by Experian 2015). Out of a total 31 Major Retailers, 13 are located within Huntingdon including Argos, Boots, Carphone Warehouse, Clarks, Clintons, New Look, O2, Sainsbury, Superdrug, Vodafone, Waitrose, WH Smith and Wilkinsons.

The total number of units in the centre has decreased from 179 to 173 since the 2010 retail study. This decrease is accounted for by the change of use and merging of units within the centre. This includes Essential Supermarket at the northern end of the High Street which has merged from one to two units, as well as a number of units that have changed from retail use to residential.

Convenience

At the time of the Nexus site visits, there were 12 convenience units in the centre. This number is unchanged since 2010. The number of convenience units represents 6.9% of all units in the town centre, which is below the UK average of 8.6%.

The amount of convenience floorspace in the centre is 21.7% of the total floorspace. This significantly exceeds the UK average of 15.2% and reflects the number of supermarkets located in the centre. Notably, Waitrose and Sainsbury's have a combined floor area of 6,080 sq m, equating to 75% of the total convenience floorspace.

Overall, there is a wide choice of town centre supermarkets in Huntingdon, in addition to the large out-of-centre Lidl and Tesco Extra located to the north of the centre.

The NEMS household survey results indicate that the most popular supermarket in Huntingdon is Sainsbury's with 6.3% of overall respondents

	<p>and 16.1% of respondents from Zone 1 (respondents residing in Huntingdon) choosing to undertake their main food and grocery shop here.</p> <p>Every Wednesday and Saturday there is a market at Market Hill which has, over the years, gradually reduced in size and the convenience offer is now only represented by a greengrocers, butchers and bakers. A farmers market is also held every second Friday offering locally produced goods.</p>
Comparison	<p>At present, comparison units account for 39.3% of all Huntingdon's retail units. This is above the UK average of 32.1%, and is indicative of the volume of national multiples in the centre.</p> <p>The representation of comparison units has dropped from 45.3% to 39.3% since 2010 but is still 6% above the UK average.</p> <p>The comparison offer makes up 48% of overall floorspace. This is extremely high, exceeding the UK average of 35.9% by 12.1%, reflecting the high presence of national multiples occupying larger units in the centre.</p>
Services	<p>Retail service units make up 39.3% of units in Huntingdon with a range of National Multiples including Costa, Starbucks, Dominos, Pizza Express, Subway, Thomas Cook, NatWest, Lloyds, Halifax, Barclays, Santander, HSBC and Nationwide. This is a significant increase from the equivalent figure of 31.8% of all units in 2010. Over that period, 11 new service units have opened in total including Boot's Optician's, Empire House of Beauty located in Newtons Court and the Original Thai Takeaway and Shanghai Chinese Food which are both located at the southern end of the High Street. Notably, the representation of retail service units is still below the UK average of 47.7%. However, this is considered to be balanced out by the above average presence of comparison stores meaning there is a more varied shopping experience than in many other centres that may be considered 'service dominant'.</p> <p>Huntingdon has a wide range of retail services with the most dominant being A3/A5 café/restaurant and take-away retailers, accounting for 24 of the 68 units, the majority of which are located at the south end of the High Street.</p> <p>Recent changes to food and drink services in Huntingdon centre include the reopening of the Falcon Pub and Hill Café (which has recently re-opened under new management) at Market Hill Square. It is also evident from our site visits that there are a number of new bars under construction, including Weatherspoons on George Street, which is due to open later this year. Planning permission for a new 'up market' wine bar at the Masonic Hall, located to the northern end of the High Street, was granted in August 2015, but is yet to open.</p> <p>Huntingdon also has a strong presence of financial service providers including 6 banks.</p> <p>The NEMS household survey results show that 9.6% of respondents visit the centre because of its choice of services. This is high when compared to the centres of St Neots, St Ives and Ramsey, where retrospectively, 3.09%, 6.44% and 1.28% respondents visit for this reason.</p>

<p>Vacancies</p>	<p>At the time Nexus completed their Retail Survey in June 2016, Huntingdon had 17 vacant units. This is a vacancy rate of just 9.8% of all units, which compares favourably to the UK average of 11.3% of all units. The same is true of the amount of vacant floorspace (5.0%) when compared to the UK average of 9.2%.</p> <p>Recently occupied units include Sklep Grosik (foodstore and off-licence) on the High Street, Grape Tree Health Foods in Chequers Court, the merging of Essential Supermarket to the north of the High Street, two takeaways to the south of the High Street and the Brampton Pie Company in St Benedict's Court. Interestingly, two previously vacant units have changed use to residential dwellings, thereby further reducing this number.</p> <p>A cluster of vacant units is evident in St Benedict's Court, which has 5 vacant units. This is surprising considering the high footfall in this area and the close proximity to Waitrose. The refurbishment of Chequers Court, along with the new development proposal, may make this area more desirable to retailers over St Benedict's Court, particularly as it is likely to achieve higher footfall when the development is completed. Furthermore, a number of these vacant units are fairly large which may not fit the specification of the majority of occupiers.</p>
<p>Miscellaneous</p>	<p>Huntingdon has a particularly high representation of employment agencies (8 in total) present in the town centre.</p>
<p>New Developments</p>	<p>A new link road was completed in 2014, in line with the Huntingdon West Area Action plan, with the aim to open up and expand Huntingdon Town Centre to the north west. Sainsbury's were originally granted planning permission for a large store in this area in 2013. However, in early 2015 Sainsbury's withdrew from the scheme and decided to refocus investment on their existing town centre store.</p> <p>Chequers Court is a retail development located off the High Street to the north of the town centre with the next phase due to open in 2017. The development, which replaces the old inland revenue offices and outdated shopping units, comprises a 9,290 sq m shopping centre to expand on the existing retail at Chequers Court.</p> <p>The intention is to provide the centre with major anchor retailers and, at the time of writing, it has been confirmed that the development will include a 882 sq m Marks and Spencer and 1,393 sq m Next store. This will increase the number of Major Retailers (as defined by Experian) in Huntingdon to 15. Development started in January 2016 and is due to be completed in Spring 2017.</p> <p>The first phase of the development upgraded the existing retail units linking the High Street to the site and created a more prominent entrance to Chequers Court. Since the last retail study, Grape Tree (convenience store) has taken up a unit in the Court; however, there are still two vacant units.</p> <p>The new Chequers Court development will complement the existing retail provision at St Germain Walk, adjacent to Chequers Court, which includes a range of larger units comprising Superdrug, Sports Direct, Poundland and Sainsbury's.</p> <p>On the 18th February 2016 planning permission was granted for a 1,711 sq m (gross) Aldi store at Eddison Bell Way to the north west of the town centre</p>

**Pedestrian
Flows**

which opened on 1st December 2016.

The majority of shoppers were witnessed in the pedestrianised area of the High Street, as this is where the majority of the national multiples are located. The seating area adjacent to St Benedict's Court also encourages footfall and contributes to increased activity in the area.

Pedestrian flows were equally as high at Chequers Court and along St Germain Walk. Again, this is likely to be high due to the location of Sainsbury's as well as the attraction of the improved phase one and phase two developments along Chequers Court.

Pedestrian flows were comparatively low to the north of the High Street and to the south of the High Street, where the majority of A3/A5 units are present. However, due to the presence of restaurants and hot food takeaways, this area presumably has a higher footfall in the evenings.

Accessibility

Huntingdon Train Station is located to the west of Huntingdon Town Centre and offers half hourly services to Peterborough and London Kings Cross. The station is served by Great Northern Trains.

The Cambridgeshire guided bus-way was opened in 2011 and connects Cambridge, Huntingdon, Peterborough and St Ives. The service runs up to every 7 minutes.

There are a number of car parks located in the town centre including:

- Multi storey and surface level short stay car park adjacent to Sainsbury's (406 spaces) short stay - paid / 2 hours free parking for Sainsbury's customers
- Princes Street car park (85) short stay - paid
- St Germain Street car park (34) short stay - paid
- Waitrose car park short stay Car Park - paid / 2 hours free parking for Waitrose customers

At the times Nexus completed their retail surveys, none of the car parks were at capacity. The top floors of the multi-storey Sainsbury's car park have not yet been opened. However, it seems likely that this capacity will be taken up with the opening of the new Chequers Court development.

Short stay parking is also located on the non-pedestrianised areas of High Street with a one-hour maximum stay.

The NEMS household survey results identified that 80.3% of respondents across the survey area travel to Huntingdon Town Centre by car, 3.3% by bus, minibus or coach with a further 12.4% choosing to walk. Interestingly, more people drive to Huntingdon than the other three centres and fewer walk, possibly reflecting the further distance travelled.

**Perception of
Safety**

The perception of safety in Huntingdon Town Centre was generally found to be high with visible CCTV cameras located throughout the centre.

The key retail frontages of the High Street, Chequers Court and St Germain Walk are active, well-lit and are provided with plentiful natural surveillance from footfall and a healthy supply of active frontages.

Environmental Quality

As previously noted, there is a cluster of vacant units along St Benedict's Court and due to the overhang of the building; the area is not as well lit. This is however balanced out by the large circulation area in front of St Benedict's Court fronting onto the High Street which has plenty of seating areas and street furniture that encourage activity.

Street lighting has recently been dimmed between the hours of 10.00pm and 2.00am and turned off between 2.00am and 6.00am. This is a strategy that is being rolled out throughout the whole county.

At the times Nexus completed their retail surveys, the shopping streets of Huntingdon were clean and appeared well looked after. This is reflected in the NEMS household survey data where 4.5% of overall respondents said they visited Huntingdon because of the environmental quality of the centre.

The newly completed Chequers Court refurbishment represents a significant improvement in the quality of the shopping environment in Huntingdon. This is likely to be enhanced by the further development at Chequers Court.

Gum targets (Figure 4.10) are located throughout the centre as an initiative to reduce litter. At the time of nexus's site visits, the targets appeared to be well used.

The seating at St Benedict's Court attracts pedestrians to gather in the area with the street art and fountain offering a contemporary feel (Figure 4.9).

The Market Square offers a fairly large open public space which is clean and well kept. It does, however, appear underutilised, surrounded by dwellings, offices and the Town Hall. The re-opening of The Falcon Pub complements the Hill Café restaurant (which has recently re-opened under new management) and will hopefully bring back some activity to the square.

Stakeholders

A meeting with a representative from Huntingdon Town Council was carried out on the 6th June who shared their thoughts and views of the health of Huntingdon Town Centre.

There was seen to be a wide choice of convenience shops in the centre. Nonetheless, it was considered that the majority of people do their big weekly shop at the out of town supermarkets such as Tesco and Lidl.

Although the presence of national retailers was noted, there is considered to be a lack of variety with a particularly large amount of phone shops, card shops and estate agents. Shoppers are much more likely to go to Peterborough or Cambridge for comparison shopping.

The new Chequers Court development is viewed as a positive for the town, particularly because Marks and Spencer food left Huntingdon in 2009 and Next left in 2013, as they were unable to find bigger units.

There was a concern that there is not much by way of evening economy in the centre. This is reflected by the loss of the 'Level 2' night club which closed in 2012. However, it is hoped that the reopening of the Falcon pub, the opening of Wetherspoons and the new wine bar at the Priory will provide a boost.

The amount of vacant units is not seen as a concern. However, there is a notably high turnover of units within the centre.

Customer Views and Behaviours

A lot of residents feel like the price of parking is an issue in the centre. It is recognised that Sainsbury's multi-storey car park is underutilised. There is thought to be a lack of long stay car parking spaces within the centre, with a ring of long stay car parks located outside the centre aimed to keep the centre car parks short stay for shoppers. This tends to encourage people working in the town to park in residential roads.

The bus-way is seen as a positive and appears well used, although it is considered that residents are more likely to use it to go out of Huntingdon to Cambridge than to travel into Huntingdon.

The household survey undertaken by NEMS sought to identify how frequently respondents visited particular centres and what their views were in respect of the centres they visit.

Figure 5.1 in Section 5 shows the boundaries of each zone (also shown in **Appendix A**)

The NEMS Household Survey identified that Huntingdon is the most commonly visited centre in Huntingdonshire with 37.5% of all respondents from the Study Area confirming that they visited Huntingdon the most; this compared to 28.1% stating they visited St Neots the most, 27.1% St Ives and 7.3% identifying Ramsey as the most frequented centre.

Respondents from Zone 1 (the centre containing Huntingdon) visit Huntingdon most often (92.2%). A significantly smaller percentage of Zone 1 respondents specified they visited the other centres with only 6.4% visiting St Ives most often and 1.4%, St Neots. No respondents from Zone 1 said they visited Ramsey most often.

The main reason respondents visit Huntingdon is due to its close proximity to their home (40.9%) with 19.1% of respondents stating their reason for visiting the centre is for the choice and range of shops. More people visit Huntingdon for this reason than any other centre, illustrating the strong convenience presence within the centre.

In terms of how often respondents visit the Huntingdon Town Centre, the results illustrate that the majority of respondents visit Huntingdon at least once a week (31.3%), with only 2.6% visiting daily. This illustrates Huntingdon's role as a larger centre where people are more likely to go for larger shops and less likely for 'top up' shopping.

Conclusion

- Huntingdon is the most frequented centre.
- The retail composition has remained fairly steady since 2010.
- Although both St Neots and St Ives have more retail units, Huntingdon has the highest supply of national multiples which is reflected by a particularly strong presence of comparison stores as well as results from the household survey.
- The Chequers Court development will see the introduction of more comparison retailer draws to the town centre (with Next and Marks and Spencer already confirmed).
- High pedestrian flows were noted throughout the centre, particularly in the pedestrianised areas of the High Street and the new Chequers Court development.
- Very few bars and restaurants serve the town's night time economy.

Key Issues

However, a number of new bar and pub developments have just come forward in addition to the reopening of the Falcon Pub and Hill Café on Market Hill which should provide a boost.

- Reliance on the car to visit the centre.
- There is a cluster of vacant units around St Benedict's Court.
- Parts of the centre (including St Benedict's Court) may suffer due to the new Chequers Court development.
- Market Square underutilised.

St Neots

Address	High Street/ Market Square/ New Street/ South Street/ Huntingdon Street
Description	<p>St Neots is the largest town in Huntingdonshire in terms of retail floorspace. Out of all four centres, St Neots has the second highest presence of National Multiples which is reflected in the Venuescore rankings in Figure 4.1.</p> <p>St Neots is located approximately 15 miles north east of Bedford and 20 miles west of Cambridge. The River Great Ouse forms a distinctive feature through the centre of the town.</p>
Current Status	Market Town Centre (Local Plan) / Major District (Venuescore classification)

Photos



Figure 4.13: View looking along the High Street.



Figure 4.14: Pedestrianised area of Market Square.



Figure 4.15: The new Cineworld development.



Figure 4.16: Four new restaurants form part of the new Cineworld development. One remains vacant.



Figure 4.17: 19 Brook Street is a long standing vacant unit has previously been occupied as an amusement arcade.



Figure 4.18: The old public house at 10-12 Market Square has been vacant for a number of years.



Figure 4.19: Cross Keys Mews, located north east of the Market Square.



Figure 4.20: There was a notable drop in footfall along secondary side streets.



Figure 4.21: Fishers Yard located south of Market Square.



Figure 4.22: Cross Keys Mews had a fairly high footfall at the time of the nexus site visits.

Figure 4.23 | Diversity of uses

St Neots	Units (no.) 2010	Units (%) 2010	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	14	8.2	16	8.7	21.7	8.6	15.2
Comparison	71	41.8	63	34.4	40.0	32.1	35.9
Service	68	40.0	83	45.4	30.3	47.7	39.0
Vacant	15	8.8	18	9.8	6.7	11.3	9.2
Miscellaneous	2	1.1	3	1.6	1.4	0.1	0.1
TOTAL	170	-	183	-	-	-	-

Overall Composition	<p>Out of all four centres, St Neots has the second largest number of retail units comprising a total of 183 units. This figure has increased by 13 units since 2010. Several units have split up in Cross Key Mews with other changes of use apparent throughout the centre in the past six years.</p> <p>St Neots has a wide range of Major Retailers (as defined by Experian, 2015) particularly along the main High Street. Out of a total 31 Major Retailers, 9 are located in the centre including New Look, Dorothy Perkins, Marks and Spencer Simply Food, Boots Pharmacy, Superdrug, Clintons, Carphone Warehouse, Waitrose and Clarks Shoes.</p>
Convenience	<p>There are a total of 16 convenience stores in the centre, an increase of 2 since 2010.</p> <p>St Neots has a strong convenience provision with four large foodstores in the town centre including Waitrose, Lidl, Co-op and Marks and Spencer Simply Food. The total convenience floorspace is currently 21.7%, which is above the UK average of 15.2%.</p> <p>There is also a large out of town Tesco Extra located at Barford Road to the south of St Neots.</p> <p>Despite the number of convenience units in the town centre, the NEMS Household Survey showed that the majority of respondents from Zone 10 (being the Zone that St Neots is located within) shop at the out of town Tesco Extra (58%) compared to 10.6% who shop at Waitrose, 7.5% Lidl and 6.0% Co-op within the town centre.</p> <p>There are also a number of smaller independent convenience units including Baker Best, Sweet Paradise (confectionary) and Stephens (butchers).</p>

	<p>A market is held every Thursday in the Market Square in addition to a farmers market held every month.</p> <p>St Neots' markets are important characteristics of the Town Centre and must be retained to preserve the town centre's offer. The market in St Neots has 26 traders on average, which is above the national figure.</p>
Comparison	<p>There are 63 comparison units in St Neots Town Centre. The number of comparison units in the centre has decreased by 8 units between 2010 and 2016, but remains 2.3% above the UK average of 32.1%.</p> <p>St Neots anchor department store 'Barretts', located to the far east of the High Street, restructured in 2016 but closure is expected early in 2017.</p> <p>St Neots has a strong supply of independent retailers, notably in Cross Key Mews and Fishers Yard which are occupied by an array of smaller units. Cross Key Mews has a very high turnover of retail units. This is reflected by the fact that 5 units have changed since the last Experian Goad Study (Dec 2015). This includes the splitting up of Popes Shoe Repairs to accommodate Mobile World Phone, the addition of Bohemia Café, Lifelong Kitchens, Kleen Eco Dry Cleaners and Sloth Children's Clothes.</p>
Services	<p>Retail service units account for 45.4% of overall units. This is an increase of 5.4% since 2010 and is 2.3% below the UK average.</p> <p>St Neots has a strong food and drink offer, accounting for 19% of service units and 12% of the overall floorspace for St Neots. National Multiples include Domino's Pizza, Costa, Subway Café Nero, Pizza Hut, Prezzo, Pizza Express, NatWest, Barclays, HSBC, Halifax, Lloyds bank, Santander, Nationwide and Haart.</p> <p>A high proportion of these units are located to the north of the High Street and on Huntingdon Street which has recently seen the additions of Pizza Hut and Blazin' Burger & Cocktails. There are also a number of food and drink units fronting onto South Street and the Market Square to the west of the centre, including a cluster of units overlooking the pedestrianised area of the Market Square. This sector has been bolstered by the recent Cineworld Cinema development which includes Prezzo, Frankie & Benny's and Pizza Express restaurants and dedicated car parking facilities.</p> <p>The health and beauty sector (20 in total) has grown since 2010 with the recent additions of So Beautiful Beauty Salon on Cambridge Street to the east of the High Street and Gossip Hair Dressers on Huntingdon Street, to the north east of the centre.</p> <p>The provision of financial service units is particularly low in the town centre, accounting for just 4% of overall units at the time of the Nexus site visits.</p>
Miscellaneous	<p>At the time of the Nexus Site visits, St Neots had three miscellaneous units; a Post Office, Employment Agency and Tourist Information Office. Miscellaneous units make up 1.6% of all units.</p>
Vacancies	<p>There are 18 vacant units in the centre which represents 9.8% of all units in St Neots Town Centre. This compares to the UK average of 11.3%. Although the number of vacant units in the centre has increased by three units since 2010, positively this is still 1.5% below the UK average. The vacant units are spread</p>

	<p>fairly evenly across the centre with no obvious clusters or groupings.</p> <p>The former public house at 10-12 Market Square (Figure 4.18) has been vacant for a number of years. The unit benefits from a waterfront location and a significant active frontage that offers the opportunity to positively contribute towards the thriving food and drink economy in St Neots.</p> <p>19 Brook Street (Figure 4.17) has previously been occupied as an amusement arcade and nightclub, yet stands vacant despite its prominent corner location, detracting from the character of the surrounding streets.</p> <p>Since its opening in 2014, the final retail unit of the new Cineworld complex off of Huntingdon Street has remained vacant.</p>
<p>New development</p>	<p>The Cineworld restaurant and cinema development (Figure 4.15) opened in May 2014. The development, located to the north east of the town centre, includes a six screen cinema, four restaurants and a car park.</p> <p>In March 2015, an application for an Aldi store (1,254 sq m gross floorspace), B&M Bargains (2,044 sq m gross floorspace) and Pets at Home (687 sq m gross floorspace) was permitted at the Howard Road industrial estate in Eaton Socon, south west of St Neots Town Centre (1401811FUL).</p> <p>Just south of this site, in March 2015, permission was granted for a 1,874 sq m (gross) Lidl store (14/01634/FUL).</p>
<p>Pedestrian Flows</p>	<p>At the time of the Nexus site visit, the majority of footfall was witnessed along the High Street where the core national multiples are located with a noticeable drop off along secondary side streets</p> <p>There was also a lot of pedestrian activity at the Market Square, whilst the adjoining Cross Key Mews also appeared very busy with a vibrant atmosphere benefiting from pedestrian traffic from the High Street to the Waitrose foodstore to the north.</p> <p>The west of Market Square, towards St Neots Road, had a noticeable drop in footfall as did some of the smaller roads such as Church Walk, Church Street, and the south of South Street.</p>
<p>Accessibility</p>	<p>St Neots Train Station is located to the east of Huntingdon Centre and offers half hourly services to Peterborough and London Kings Cross. The station is served by Great Northern Trains. However, the links between the station and the town centre aren't very clearly demarcated and the centre appeared to be primarily served by cars.</p> <p>There are a number of car parks located in the town centre including:</p> <ul style="list-style-type: none"> • Market Square car park (60) short stay - paid (not open on Thursdays due to the market) • Priory Lane car park (36) short stay - paid • Waitrose car park (220) short stay - free when you shop in store • Tan Yard car park (40) short stay - paid • Tebbuts Road car park (80) long stay - free • Brook Street car park (20) short stay - paid • Lidl car park car park (170) short stay - free when you shop in store

	<p>Short stay parking is also located along the High Street.</p> <p>At the times of the Nexus site visits the car parks were well utilised. Traffic and congestion was witnessed at several points along the main High Street.</p> <p>The NEMS household survey results identified that 69.5% of respondents across the survey area travel to St Neots Town Centre by car, only 2.8% by bus and a further 24.4% walk.</p>
<p>Perception of Safety</p>	<p>The perception of safety in St Neots town centre is generally high.</p> <p>Notably, the Neighbourhood Plan Survey for St Neots identified the need for better CCTV in every car park (reflected in policy PT3 of the adopted Neighbourhood Plan).</p> <p>The High Street in particular is active and well-lit providing natural surveillance. The pedestrianised area of the Market Square offers plentiful natural surveillance from active frontages.</p> <p>Street lighting has recently been dimmed between the hours of 10.00pm and 2.00am and turned off between 2.00am and 6.00am. This is a strategy being rolled out throughout the whole county.</p>
<p>Environmental Quality</p>	<p>St Neots is a charming historical town with a lot of character. At the time of Nexus site visits it was very clean and well-kept with a lot of pedestrian activity throughout the centre. The NEMS household survey results show that 6.1% of respondents who visit St Neots do so for the environmental quality. This was the highest score of all four centres.</p> <p>The night time economy is particularly strong in St Neots. This is reflected by the plethora of food and drink services available throughout the centre.</p> <p>There was a particularly vibrant atmosphere at the Market Square with pedestrians congregating outside the cafes and restaurants. This was also apparent at the new Cineworld complex and associated restaurants which attracts a fair amount of night time activity.</p> <p>The small shopping mews off the High Street including Cross Keys Mews, Fishers Yard and Church Walk create a fair amount of activity and offer natural surveillance.</p> <p>The smaller roads in the centre including Cambridge Street and Church Street (to the south of the High Street), Brook Street (to the south of Market Square) and the covered Moores Walk, are not as well-lit as other parts of the centre, offering less visual surveillance.</p>
<p>Stakeholders</p>	<p>On 7th June Nexus met with representatives from the St Neots Town Council and St Neots Town Centre initiative, with a further meeting held with Town Councillors on 4th July. A business networking event was also taking place on the day of the 7th June meeting which gave Nexus the opportunity to speak with local business owners. The following thoughts and views were shared in relation to the health of the town centre.</p> <p>St Neots is the only one of all four market towns that has a Neighbourhood Plan, adopted in early 2016. Additionally, St Neots applied for a Mary Portas Pilot Bid in 2012, which they failed to win.</p>

Customer Views and Behaviours

Stakeholders acknowledged the strong convenience and food and drink offer in St Neots.

The long standing vacant units are noted as a concern, particularly the old pub at the Market Square due to its prominent location.

There is thought to be a low charity shop take up, which was disputed amongst some other Stakeholders who did not agree.

The new Cineworld complex is considered to be a positive attribute for the centre.

There are concerns that parking is too expensive in the centre. However, this was not backed up by the NEMS Household Survey, where only 2.3% of all respondents said that cheaper parking would encourage them to use their preferred shopping centre more often.

St Neots commuter town status, along with planned development through the emerging Local Plan is noted. Stakeholders consider further retail will be needed to support the rising population.

The household survey undertaken by NEMS sought to identify how frequently respondents visited particular centre and what their views were in respect of the centres they visit.

Figure 5.1 in section 5 shows the boundaries of each zone (also shown in **Appendix A**).

The NEMS household survey results identify that 39.6% of respondents visit St Neots the most often.

Additionally, 95.8% of respondents within Zone 10 (being the Zone that St Neots is located within) identified they visit St Neots the most often.

The main reason respondents visited the centre is as it is close to work (45.4%). A further 11.7% visit for its range of shops.

Conclusion

- The centre has a particularly strong convenience offer.
- The centre has a pleasant environmental quality.
- Although above the UK average, the comparison offer is not as strong as Huntingdon.
- There is strong footfall along the High Street and towards the Market Square.
- The centre has a buoyant night-time offer.

Key Issues

- Improved permeability within the town centre's road network.
- Catering for the rise in local population.
- Potential to take advantage of the waterside location.
- A couple of prominent units have been vacant for a number of years, in particular the vacant former public house at Market Square.

St Ives

Address	Broadway, Market Hill, Station Road , Bridge Street
Description	<p>St Ives has the largest Centre in terms of the number of units. The historic town of St Ives is located in the east of the District, approximately 5 miles east of Huntingdon and 16 miles north west of Cambridge.</p> <p>The A1123 dissects the town from east to west with RAF Wyton located directly north west of the site (strategic allocation in the emerging local plan).</p>
Current Status	Market Town Centre (Local Plan)

Photos



Figure 4.24: The walkway along the riverside.



Figure 4.25: The Norris Museum



Figure 4.26: Signage along the riverside.



Figure 4.27: Cromwell Mews.



Figure 4.28: Street parking at Market Hill.



Figure 4.29: Sheep Market.



Figure 4.30: Riverside view.



Figure 4.31: Townrow department store.



Figure 4.32: Seating along the river side at The Quay.



Figure 4.33: Views up the Broadway.

Figure 4.34 Diversity of uses

St Ives	Units (no.) 2010	Units (%) 2010	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	15	7.6	14	7.0	13.5	8.6	15.2
Comparison	83	41.9	80	40.2	44.5	32.1	35.9
Service	81	40.9	91	45.7	35.3	47.7	39.0
Vacant	18	9.1	12	6.0	5.8	11.3	9.2
Miscellaneous	1	0.5	2	1.0	1.3	0.1	0.1
TOTAL	198	-	199	-	-	-	-

Overall Composition	<p>Out of all four centres, St Ives has the largest number of retail units. At the time of the Nexus site visits there were 199 retail units in the Market Town Centre, an increase of one since 2010.</p> <p>In terms of floorspace, St Ives is the second smallest, reflecting a high presence of small units within the centre.</p> <p>Since 2010, St Ives has not featured in the Venuescore rankings reflecting the lower presence of Major Retailers (as defined by Experian, 2015) located in the centre which are mainly situated along Crown Street just before the Pavement. These include New Look, WHSmith, and Lloyds Pharmacy.</p>
Convenience	<p>There are a total of 14 convenience units in St Ives Town Centre. This figure is unchanged from 2010 and makes up 7.0% of overall units. This is below the UK average of 8.6%. Convenience floorspace totals 13.5% which is also below the UK average of 15.2%.</p> <p>One of St Ives' biggest draws is its range of markets. There are regular weekly markets on Monday and Friday (managed by Huntingdonshire District Council). In addition, the farmers market runs on the first and third Saturday of each month.</p> <p>On bank holiday Mondays' the St Ives' market is particularly vibrant, attracting over 150 stalls that take over the whole market square.</p> <p>The NEMS Household Survey results showed that 31.2% of overall respondents said St Ives Street Market was the market they frequented the most. Further, 71.7% respondents from Zone 3 (the zone which St Ives is within) visit St Ives street market the most. When compared to the results from the other centres where 16.8% of overall respondents most regularly visit Huntingdon market, 17.8% St Neots market and 2.6% Ramsey market. it is very clear that St Ives is</p>

	<p>the most popular market.</p>
Comparison	<p>There are 80 comparison retail units in St Ives equating to 40.2% of overall retail units. This is higher than the UK average of 32.1% and a decrease of 4 units since 2010.</p> <p>The majority of comparison units are made up of independent retailers. However, there are several national multiples located along Market Hill and Crown Street.</p> <p>The majority of independent retailers are located at either end of the centre on Station Road and the Broadway. There is also a high presence of independent retailers along Bridge Street at Merryland, parallel to Crown Street and at Bridge Street south of the centre.</p> <p>Manor Mews (west of Bridge Street) and Cromwell Street (south of Station Road) have a high presence of smaller, independent convenience units. Cromwell Mews has a particularly high turnover and since the last Experian Goad survey was undertaken (June 2015) there have been 8 changes to units within Cromwell Mews.</p>
Services	<p>Retail services equate to 45.7% of overall units in St Ives. This figure is below the UK average of 47.7%. Since 2010 the number of retail services in the centre has increased by ten units and is the only sector that has grown. There are 7 National Multiple service units in the town centre including Costa, Domino's, Pizza, Thompson, Lloyds, NatWest, Barclays and HSBC.</p> <p>The increase in retail services in the centre is mainly down to the health and beauty sector which has recently seen the addition of four beauty salons throughout the centre. These additions include Tiande Health and Beauty and Citrus Rooms located on Cromwell Mews, the Beauty Lounge to the west of the Quay and the Laser Boutique at Merryland.</p> <p>The strongest provision of services in the centre is food and drink (35 units in total) with the majority located along the Broadway. This reflects the healthy evening economy in St Ives which is known to be very busy on Friday and Saturday evenings. Notwithstanding this, there used to be four night clubs in the centre but now there is only one still open. The amount of pubs may have contributed to this and the fact that the majority now have a licence to stay open later.</p>
Vacancies	<p>At the time of the Nexus site visits there were 12 vacancies in the centre, making up 6.0% of overall units. The number of vacancies has decreased by 6 units since 2010 and is nearly half the UK average 11.3%. There is no clustering of vacant units and they are disbursed evenly throughout the centre.</p> <p>It is important to note that the vacant unit at 8-10 Market Hill is currently under construction. Planning permission was approved on the 3rd June 2016 (15/00682/FUL) for a public house.</p> <p>Other vacancies include the closed down Element Night Club to the north of Broadway and the public house at 11-12 Market Hill.</p>
Miscellaneous	<p>At the time of the Nexus site visits St Neots had 2 Miscellaneous units, an increase of 1 since 2010. These are a post office and employment agency.</p>

New development	Morrison's was granted planning permission for a supermarket and Fuel Station between Needingworth Road and Harrison Way, next to the Marsh Harrier pub, in 2014. The development is currently on hold and there is speculation as to whether the store will be implemented or not.
Pedestrian Flows	<p>At the time of the Nexus site visits, the majority of footfall was witnessed along Market Hill, the Pavement and the pedestrianised area of Crown Street where the core national multiples are located. There was a noticeable drop off along secondary side streets.</p> <p>There was also a fair amount of pedestrian activity down Bridge Street.</p> <p>Pedestrian flow is also high along the Broadway in the evening, due the amount of restaurants/ takeaways in this area.</p> <p>There was noticeably lower footfall along Station Road as well as the smaller side roads such as White Hart Lane and the Crown Place.</p>
Accessibility	<p>St Ives does not have a train station, but the Cambridgeshire guided bus way was opened in 2011 and connects Cambridge, Huntingdon, Peterborough and St Ives. The service runs up to every 7 minutes</p> <p>There are a number of car parks located in the town centre including:</p> <ul style="list-style-type: none"> ● Waitrose/ Cattle Market car park (80) –long and short stay paid ● Market Hill car park (20) – short stay paid ● Market Road car park (60) – short stay paid <p>There is also a fair amount on street car parking located including along Bridge Street, Station Road and Market Street.</p> <p>On the day of the Nexus site visits the car parks were well utilised.</p> <p>The NEMS household survey results identified that 71.4% of respondents across the survey area who visit St Ives travel to the centre by car, a further 9.3% travel by bus, the busway or guided bus, coach or mini bus and 14.4% walk. More respondents travel to St Ives by bus than any other of the centres reflecting the popularity of the guided bus.</p>
Perception of Safety	<p>The perception of safety in St Ives Town Centre is high. Market Hill and the Pavement in particular have a high level of natural surveillance and overlooking.</p> <p>The thriving night time economy means there is plenty of night time surveillance.</p> <p>Street lighting as recently been dimmed between the hours of 10.00pm and 2.00am and turned off between 2.00am and 6.00am. This is a strategy being rolled out through the whole County.</p>
Environmental Quality	<p>At the time of Nexus site visits, St Ives appeared clean and well kept.</p> <p>The Sheep Market (Figure 4.29) has plenty of street furniture including landscaping and seating areas on a large paved area, creating a pleasant atmosphere. The seating area outside Tom's Cakes opposite the Sheep Market adds to the vitality of the area.</p> <p>There is also plenty of street lighting and signage (Figure 4.26) throughout the</p>

Stakeholders

centre.

The pavements throughout the centre are wide encouraging pedestrian activity.

There is a particularly pleasant atmosphere along the river at The Quay (Figure 4.32), including a couple of seating areas. However, this area appeared underutilised particularly as there are few active frontages facing the river.

The night time economy along the Broadway creates a particular buzz in the evenings.

The small shopping Mews off the High Street, including Cromwell Mews (Figure 4.27) provides natural surveillance and offers a quaint shopping experience.

On the 7th June Nexus met with the Town Clerk, the Town Mayor and representatives from the St Ives' Town Team and St Ives' Town Centre Initiative. The following thoughts and views were shared in relation to the health of the town centre.

Overall there is a positive view of the health of St Ives.

The increasing trend to buy online is noted, as well as the rise of click and collect.

St Ives has a strong presence of independent stores and it is noted that, the younger population in particular, would like to see more national multiples in the centre. Currently the majority of shoppers go to Peterborough and Cambridge for the national multiples.

Over the last few years there has been a big increase in coffee shops and art shops.

The Norris Museum is very popular and, taking advantage of the guided bus, there is an opportunity to tap into tourists visiting Cambridge. There is currently a lack of accommodation for tourist in the area including B&B and caravan sites.

The strong evening economy is also noted – however there is perhaps a lack of activity for the younger population.

The guided bus is a big success providing improved links to Cambridge.

It is considered that there needs to be more short term parking. It is particularly hard to park in the daytime which leads to people parking on residential streets.

The successful markets are a particularly strong draw to St Ives. These include specialist markets such as Victorian Christmas markets and continental street fairs. The jazz and blues festival which runs every year is also noted as a big attraction.

There is potential scope for development at the Waitrose/ bus station area and it is understood Waitrose are keen to expand.

It is considered that St Ives have lost out on street furniture. Plans have previously been put forward for improvements including pedestrianisation of the centre but nothing has come of it.

<p>Customer views and behaviour</p>	<p>The household survey undertaken by NEMS sought to identify how frequently respondents visited particular centres and what their views were in respect of the centres they visit.</p> <p>Figure 5.1 in section 5 shows the boundaries of each zone (also shown in Appendix A).</p> <p>27.1% of overall respondents stated that they visit St Ives the most. Furthermore, of respondents who reside in Zone 3 (being the zone in which St Ives is located) 85.2% said that St Ives was the centre they visit the most often. When asked how often they visit, 31.6% of Zone 3 outlined they visit at least once a week.</p> <p>The overriding reason for visiting St Ives was as it is 'close to home'. This was the number one reason given by 47.5% of all respondents who said they visited the centre the most often. Interestingly, this is the number one reason for respondents visiting all of the four centres and reflects the increasing popularity of residing in market towns and the important role all four centres have in supporting the surrounding population.</p> <p>The second most common reason for visiting the town centre was its choice and range of shops (12.0%) followed by choice of services (6.8%) with 4.5% of respondents confirming they visited St Ives because it has a 'good market'.</p>
<p>Conclusion</p>	<ul style="list-style-type: none"> • There has been very little change to diversity of uses in St Ives since 2010. • The centre has a particularly strong offer of independent retailers. • There is a buoyant night-time economy. • The numerous markets and events are very popular and attract a lot of people to the centre. • There is a particularly high retail services offer. • Vacancies are very low.
<p>Key Issues</p>	<ul style="list-style-type: none"> • The river is potentially not utilised as well as it could be. • There is a low presence of national multiples. • The convenience offer could be improved – there are uncertainties surrounding Morrisons

Ramsey

Address	Great Whyte, High Street, Little Whyte
Description	Ramsey is the smallest of the District's market towns located to the far north east of the District, 12 miles south east of Peterborough.
Current Status	Market Town Centre (Local Plan)

Photos



Figure 4.35: Street parking on the Great Whyte



Figure 4.36: looking south along the Great Whyte, towards the High Street.



Figure 4.37: Many independent shops such as 'Best Wishes' frequent the Great Whyte and the High Street.



Figure 4.38: View east of the High Street where many takeaway units are located.



Figure 4.39: Out-of- centre Tesco at Neil Way



Figure 40: Darling Mews

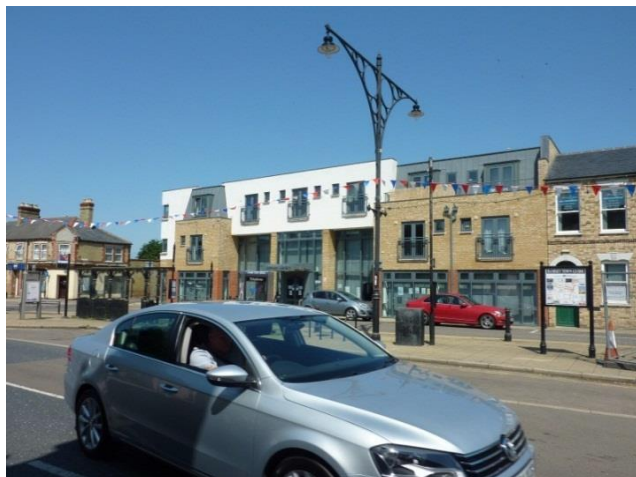


Figure 4.41: The Library along the Great Whyte.



Figure 4.42: On street parking along the Great Whyte.



Figure 4.43: Dwellings to the north of the Great Whyte.



Figure 4.44: The Co-op north of the centre.

Figure 4.45 Diversity of use

Ramsey	Units (no.) 2010	Units (%) 2010	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	11	12.5	8	9.8	19.2	8.6	15.2
Comparison	29	33.0	30	36.5	37.5	32.1	35.9
Service	36	40.9	34	41.5	30.7	47.7	39.0
Vacant	11	12.5	9	11.0	11.7	11.3	9.2
Miscellaneous	1	1.1	1	1.2	0.8	0.1	0.1
TOTAL	88	-	82	-	-	-	-

Overall Composition	<p>Out of all four centres, Ramsey is by far the smallest, both in terms of units and floorspace.</p> <p>There are currently 82 retail units in Ramsey, (a reduction of 6 retail units since 2010), mainly due to retail units changing to residential use.</p> <p>There are no Major Retailers (as defined by Experian 2015) present in the town centre and very few national multiples including Lloyds Pharmacy, TSB and Nationwide. Ramsey has not yet featured in the Venuescore rankings.</p>
Convenience	<p>There are 8 convenience stores in the centre, a reduction of 3 units since 2010.</p> <p>Convenience units make up 9.8% of the overall composition of Ramsey This is above the UK average of 8.6%. The percentage of convenience floorspace is 19.2%, which is also above the UK average of 15.2%.</p> <p>The main foodstores in Ramsey are the Co-op (Figure 4.44), located to the north of the centre (which has since announced that it is to close), and Tesco Superstore (Figure 4.39), also located to the north of the centre, off Neil Way.</p> <p>It is important to note that, even though it appears on the Goad plan, the Co-op site is considered to be located 'edge-of-centre' and Tesco Superstore 'out-of-centre'. The household survey confirms that the majority of shoppers drive to both these stores.</p> <p>The NEMS Household Survey data reflects the popularity of the Tesco superstore with 63.3% of respondents in Zone 5 (the zone in which Ramsey is located) confirming that Tesco is where they carry out their main shop. The Co-op on the other hand is less popular with just 14.0% of respondents from Zone 5 currently shopping there.</p> <p>There is a market held every Saturday in Ramsey Town Centre. However, there</p>

	<p>has been a significant decline in stalls and more recently has just included one stall (greengrocer).</p>
Comparison	<p>There are 30 comparison units located in Ramsey. The number of comparison stores has remained stable, with an increase of one unit since 2010. The comparison offer makes up 36.5% of the centre, which exceeds the UK average of 32.1%. The majority of comparison units are independent stores offering a variety of goods.</p>
Services	<p>There are 34 service units in Ramsey which is a reduction of two units since 2010.</p> <p>The strongest service sector is the food and drink sector which makes up 44% of the service offer. These are mainly made up of takeaways and cafes/sandwich bars.</p> <p>The health and beauty sector is also fairly strong equating to ten units.</p> <p>The finance and business sector is particularly weak in Ramsey. Since the last Experian Goad survey was undertaken (Nov 2013), two banks have closed (Barclays bank at 11 the Great Whyte and NatWest Bank at 67 the High Street), leaving just two banks in the centre.</p> <p>National Multiple services include the banks Nationwide and TSB.</p> <p>The NEMS Household Survey results showed that just 1.28% of respondents visited St Ives Town Centre for its retail services. This is the lowest number for all centres with 9.64% visiting Huntingdon, 3.09% St Neots and 6.44% St Ives for their retail services.</p>
Vacancies	<p>The number of vacant units has remained the same (11 units) since 2011 and is in line with the UK average of 11.3%.</p> <p>Notably, since the last Experian Goad survey was undertaken (Nov 2013), four vacant units throughout the centre have changed to dwellings.</p>
Miscellaneous	<p>At the time of the Nexus site visits Ramsey had 1 miscellaneous unit (a post office). This number has remained the same since 2010. Interestingly, Ramsey is the only centre that does not have an Employment Agency.</p>
Pedestrian Flows	<p>At the time of the Nexus site visits, the majority of footfall was witnessed along the High Street and the bottom of the Great Whyte.</p> <p>Pedestrian activity notably reduced further up the Great Whyte where there is a strong presence of dwellings. As confirmed in the accessibility section below, due to their location, the majority of shoppers travel by car to the Co-op and Tesco Extra which further reduces pedestrian activity along the Great Whyte.</p>
Accessibility	<p>Accessibility is notably difficult within Ramsey which, unlike the other three centres, does not have an A Road running through or adjacent to it.</p> <p>Ramsey does not have a train station. However, there are 12 local bus services from Ramsey travelling from and to St Ives and Peterborough.</p> <p>There are a number of car parks located in the town centre including:</p>

- Mews Road car park (60) short stay-free
- Co-op car park (100) – short stay - free
- New Road car park – long stay-free

There is also on street parking along the Great Whyte (130 spaces) (Free - 1 hour) (Figure 4.42).

At the time of the Nexus site visits, there were plenty of car park spaces available, particularly along the Great Whyte.

The NEMS Household Survey results identified that 70.2% of respondents across the survey area who visit Ramsey travel to the centre by car. More people walk to Ramsey than any other centre – 24.4% reflecting the presence of residential properties in the centre. Ramsey is the only centre where no respondents travelled to it by Bus.

Perception of Safety

When Nexus carried out their site visits the perception of crime was very low.

There is street lighting along the Great Whyte and High Street. Street lighting has recently been dimmed between the hours of 10.00pm and 2.00am and turned off between 2.00am and 6.00am. This is a strategy being rolled out across the whole county.

Environmental Quality

At the time of Nexus’s site visits there was road works being carried out in the middle of the Great Whyte which impacted on the environmental quality.

Due to the low footfall and amount of dwellings, the north of the Great Whyte had far less active surveillance. However, the plethora of street parking increases activity along the street. The active frontages along the High Street and bottom of the Great Whyte encourage overlooking. The presence of hot food takeaway units also increases night time surveillance.

The NEMS Household Survey results illustrated that, out of all four centres, fewest respondents visit Ramsey for its environmental quality, just 1.02%. This suggests Ramsey has the poorest environmental quality of the four centres.

Nearby wind turbines are visible from the town centre and could be considered an eye sore.

There was notably a lack of outside seating areas, both on the street and outside cafes/ pubs.

There is a notable lack of signage.

Stakeholders

On the 6th June 2016 Nexus met with representatives from Ramsey Million, Ramsey Neighbourhood Trust and the Community Partnership. The following thoughts and views were shared in relation to the health of the town centre.

In 2013 Ramsey Parish were awarded £1 million as part of the big local programme funded by the Big Lottery Fund and managed by the Local Trust, known locally as ‘the Ramsey Million’.

The retail offer is different from other towns and there is a strong presence of independent stores. It is recognised that the size of the shops is too small to attract larger independent stores.

	<p>There is a lack of clothes shops – people usually go to Tesco’s Extra for necessities.</p> <p>Wades electrical shop attracts people into the centre. This is reflected in the NEMS household survey results where 2.3% of overall respondents said they visit Ramsey for electrical goods compared to 7.8% of overall respondents visiting Huntingdon Town Centre, 2.9% St Ives and 7.2% St Neots Town Centre. In addition, 37.4% of overall respondents within Zone 5 (being the zone that Ramsey is located) shop within Ramsey for their electrical goods. Taking into consideration the size of Ramsey, these figures are very high and reflect the popularity of Wades.</p> <p>Since the loss of the farmers market, they are working on a speciality market selling crafts and a craft weekend/ festival with free stalls to bring people in.</p> <p>There is big potential to tap into the heritage and tourism offer.</p> <p>There is currently very little night time economy. The pubs are usually very busy but mainly attract the older generation. There is little to no leisure offer, especially for the younger population who travel instead to Huntingdon.</p> <p>The town has plenty of parking of which the majority is free. It is considered important that it is kept free as this is what sets Ramsey aside from the other town centres.</p>
<p>Customer views and behaviours</p>	<p>The household survey undertaken by NEMS sought to identify how frequently respondents visited particular centre and what their views were in respect of the centres they visit.</p> <p>Figure 5.1 in Section 5 shows the boundaries of each zones (also shown in Appendix A)</p> <p>The NEMS household survey identifies that out of the main town centres in Huntingdonshire, Ramsey is the least frequented by the respondents within the Study Area, with only 7.3% stating that they visit Ramsey the most often.</p> <p>Additionally 81.0% of those residents within Zone 5 (being the Zone that Ramsey is located within) identify that they visited Ramsey the most often. This is unsurprising and is aligned with the assumption that Ramsey provides ‘key retail services’ to the local community but faces difficult in attracting visitors from a wider catchment area.</p> <p>In terms of how often these respondents visit the town centre, the results illustrate that the majority of respondents visit Ramsey at least two times a week – 39.6%, with 27.2% visiting daily. With only 7.0% of overall respondents visiting St Ives daily, 11.1% visiting St Neots daily and just 2.6% visiting Huntingdon Daily, this reflects the role Ramsey has as a smaller centre with the majority of respondents visiting daily for ‘top up shopping’.</p>
<p>Conclusion</p>	<ul style="list-style-type: none"> • The retail composition has remained fairly unchanged since 2010 (when Tesco’s opened reflecting a stable market town). • The out-of-centre Tesco Superstore provides a strong convenience offer for a centre of Ramsey’s size, though there is potential to replace the edge-of-centre Co-op foodstore (which has since announced that it is to close) with a town centre store. • Due to the current location of foodstores, residents are unlikely to link

Key Issues

- their convenience goods trips to the town centre.
- The centre has a particularly strong offer of independent retailers.
 - There has been an increase of dwellings – this is particularly notable along the Great Whyte
 - The reduction in services has included the closing down of two banks meaning there is now only two left in the centre.
 - Due to its geography, Ramsey is particularly hard to access by public transport.
 - The parking offer is plentiful in Ramsey Town Centre.
 - There is potential to expand on the tourism offer/ events and markets.
- Co-op has announced plans to close its Ramsey store.
 - Increase of dwellings, particularly along the Great Whyte.
 - Low footfall and activity.
 - Lack of night time activity.
 - The distance between the main convenience offer and the High-Street is an issue as the majority of locals drive, reducing activity in the centre.

Pipeline Developments

- 4.25 In accordance with the duty to cooperate (as prescribed in Paragraph 178 of the NPPF), Nexus has worked in collaboration with Huntingdonshire District Council to contact neighbouring local planning authorities in order to take account of pipeline schemes and identified future capacity across the sub-region.
- 4.26 A number of forthcoming retail developments have been highlighted in the following local Council jurisdictions:

East Northamptonshire District

- 4.27 The large retail and leisure complex 'Rushden Lakes', located just off the A45 at Rushden, is currently nearing completion with first stores set to open in Spring 2017. The hybrid planning application proposed a total 35,000 sq m of new retail floorspace, with Marks and Spencer, House of Fraser and Primark confirmed as anchor stores at the time of the Nexus Retail Study. A subsequent application for the same site was submitted in 2015 (ref: 15/02249/FUL) for a twelve screen cinema, ten pin bowling alley, indoor climbing structure and cycle hire facilities, which was pending determination at the time of writing.
- 4.28 An outline planning application was submitted in 2015 (ref:15/02198/OUT) for the 'demolition of existing football stadium and associated infrastructure and erection of new retail and leisure development including retail (A1), cinema (D1), hotel (C1), restaurants (A3/A5) and a new community football facility, along with access and parking' at Rusden Diamond Football Stadium. The application was refused at committee on 14th July 2016; in part due to the proposals conflict with the District's settlement hierarchy and an adverse impact on the town centre's vitality and viability.
- 4.29 Additional relevant applications in East Northamptonshire District include a permission for a new Aldi foodstore (ref: 15/01191/FUL) in Irthlingborough comprising 1,524 sq m (approved in May 2016), an application for a 1,372 sq m Asda foodstore (ref: 15/02095/FUL) including a petrol filling station (approved in February 2016) and an application in Irthlingborough Town Centre for a 930 sq m Co-op foodstore (ref: 15/00990/FUL) as well as a mixed-use A1/A3 unit and 20 dwellings (approved in May 2016).

Bedford Borough

- 4.30 Bedford is identified as a 'Major Regional' centre and ranked 105 by Javelin Venuescore in respect of retailer representation.

- 4.31 The Riverside North Development (ref: 12/02490/MAF) includes a seven screen cinema, riverside restaurants, apartments, hotel and new public open space, opening the river up to the town centre. The application, in the heart of the town centre, is currently under construction and is due to open next year.
- 4.32 The Wixams New Settlement (as allocated in the Bedford Local Plan) is 3 miles south of Bedford and covers approximately 384 hectares made up of four phased villages, including a town centre in village three. Village one has been completed and the construction of village two is underway. The main town centre will include 5,500 sq m of net retail floorspace (ref: 11/01380).

Fenland District

- 4.33 A 4,300 sq m foodstore has recently been constructed on the west side of Chatteris. The unit is yet to be occupied, with Tesco announcing in January 2015 that they were withdrawing from the development as part of a nationwide cost saving exercise. At the time of this study, the unit remains unoccupied.
- 4.34 Proposals for a foodstore in Whittlesey, Station Road were approved in 2009 for the erection of a 3,266 sq m (gross) retail store. Further amendments were made in 2015 on behalf of Sainsbury's, before it was announced in early 2016 that the Whittlesey store was no longer viable and Sainsbury's would not progress with the store.
- 4.35 In June 2015, plans were submitted for a retail park on the outskirts of March including proposals for a total of 6,317 sq m retail floorspace. The application was approved in March 2016 (Ref: F/YR15/0640/F). Next, Costa Coffee, Pets at Home and Marks and Spender Simply Food have expressed an interest in occupying units.
- 4.36 The Council has also recently published two leisure studies. The 'Indoor Sports Facilities' and 'Playing Pitch Strategy' reports were both endorsed by the Cabinet in June 2016.

South Cambridgeshire District

- 4.37 A planning application for Phase 2 of the proposed Northstowe Town Centre allocation was submitted in 2014, which includes 10,000 sq m of convenience goods floorspace, 25,000 sq m of comparison goods floorspace and 13,500 sq m leisure floorspace (including food and drink facilities). The application was still pending at the time of writing.
- 4.38 At the time of this Study, the joint Local Plan for Cambridge City Council and South Cambridgeshire District Council had been submitted for examination. The emerging plan includes a number of relevant New settlements and site allocations.

- 4.39 Policy SS/1: 'Orchard Park' site allocation includes a mixed use development on the edge of Cambridge with a minimum of 900 dwellings includes a Local centre (including retail units).
- 4.40 Policy SS/4 proposes a range of supporting retail uses at Cambridge Northern Fringe East.
- 4.41 Policy SS/5 'Waterbeach New Town' includes the provision of shops, services and leisure facilities of an appropriate scale for the proposed town.
- 4.42 Policy SS/6 proposes shops services and leisure and other town centre uses at an appropriate scale for a new rural village at Bourn Airfield, as well as open space, sports and leisure facilities.
- 4.43 Policy SS/8 for Cambourne West includes the provision of small scale shops and other town centre uses to serve the needs of the village and adjoining Business Park, as well as a store of up to 500 sq m retail floorspace
- 4.44 The Cambridge and South Cambridgeshire Local Plans (proposed) both propose the development of the Cambridge Northern fringe East area in a comprehensive and co-ordinated manner for employment led mixed use development. Work has started on the joint area action plan which will provide a mix of land uses including a range of retail. New retail provision will be part of the local centre.

Cambridge City

- 4.45 Cambridge is identified as a 'Major Regional' centre and ranked 28th by Javelin Venuescore in respect of retailer representation.
- 4.46 The Cambridge Local Plan (2006) focused on delivery of the Grand Arcade scheme which opened in 2007, therefore no sites were allocated solely for retail development. The emerging Cambridge Local Plan identifies a capacity to support 14,141 sq m net of comparison retail floorspace between 2011 to 2022. No capacity for additional convenience goods floorspace above existing commitments has been identified.
- 4.47 Policy 11 of the emerging plan outlines that Fitzroy/ Burleigh Street/ Grafton Area of Major Change) will be the primary focus for providing additional comparison retail in the City Centre, along with other mixed uses. Although the area is supported for retail expansion the precise quantum is not stated.

Central Bedfordshire

- 4.48 A new leisure centre opened in Flitwick in February 2016, including an eight lane swimming

pool, 4 x sports halls, 2 x squash courts, a gymnasium and an indoor climbing wall. At the time of writing, a 3G sports pitch and accompanying gym was due to open at Eaton Bray School in Dunstable. The Council has also carried out public consultation on plans for the redevelopment of Dunstable Leisure Centre and an application was submitted in October 2016. The existing leisure centre is due to close in the summer of 2017, with the new centre opening in winter 2018.

- 4.49 In 2014, planning permission was granted for a mixed use development to the north of Houghton Regis, to include 30,000 sq m of flexible A1, A2 and A3 use classes. The planning permission is part of a large scale urban extension and is yet to be implemented.
- 4.50 A planning application was submitted in May 2016 for 7,350 sq m comparison goods floorspace at Camden Road, Leighton Buzzard with a decision due September 2016.
- 4.51 Planning permission was approved in 2013 for a retail park at Grovebury Road comprising a total of 5,575 sq m of retail floorspace (with 2,090 sq m of mezzanine floorspace), as well as a public house, restaurant and café. The application has not yet been implemented and is due to expire in November. Officers are of the impression that the Camden Road application may be implemented in its place.
- 4.52 At the time of writing, an updated Retail and Leisure Assessment for Central Bedfordshire District Council was being finalised for publication early 2017.

East Cambridgeshire District

- 4.53 A representative from East Cambridge District Council confirmed to Nexus that there are currently no significant retail allocations coming forward as part of the emerging plan.
- 4.54 An application was permitted in December 2014 for 'Octagon Park' in Ely, a mixed use Retail Park including a food retail superstore, use class A1 (10,225 sq m), six non-food retail units use class A1 (6,508 sq m), a DIY unit with external storage/ garden centre (2,347 sq m) as well as a mix of uses including light industrial units, a restaurant (574 sq m), a hotel (2,100 sq m) and a public house (574 sq m). At the time of the application, a Tesco superstore was proposed as part of the development. However, in early 2015, Tesco confirmed that, as part of a cost cutting drive, they would be unable to proceed with the planned store in Ely.
- 4.55 An application for a food superstore and petrol filling station, six retail warehouse units, a pub restaurant, car parking for a total of 18,493 sq m of retail space and 630 sq m of restaurants and cafes, was submitted in April 2014. The application was, however, withdrawn in July 2014 due to concerns over proposals at Octagon Park.

- 4.56 An application was permitted in June 2015 for a Hybrid Planning Application consisting of a detailed scheme for the construction of a six screen multiplex cinema and four restaurants of a mixture of A3-A5 uses totalling 1,959 sq m, six smaller units in A3-A5 use (849 sq m) and an outline scheme for a district wide leisure centre (7,189 sq m) at Land Adjacent to Ely Rugby Club, Downham Road, Ely.

Peterborough City

- 4.57 Peterborough City is defined as a Major Regional City and is ranked 48th in the Venuescore rankings. At the time of writing, an updated Retail and Leisure Study for Peterborough City Council was being finalised.
- 4.58 In July 2012, planning permission was granted for a new 6,912 sq m foodstore at the old Parcel Force site at Maskew Avenue to be made up of 2,884 sq m convenience goods floorspace and 1,922 sq m comparison goods floorspace. The application has not yet been implemented.
- 4.59 The forthcoming North Westgate development proposes a new regional leisure quarter in the centre of Peterborough featuring a hotel and an eight screen multiplex cinema in addition to new restaurants, shops, bars and a foodhall with residential apartments and offices above. An outline application was granted planning permission in October 2015 for 7,000 sq m retail floorspace (Class A1/A2), as well as 5,000 sq m restaurants and cafes (Class A3) and a foodhall (Class A1, A3, A4 and A5) of up to a maximum of 2,000 sq m to be completed by late 2017/ early 2018.
- 4.60 Planning permission was granted in July 2016 for an extension to Queensgate Shopping Centre comprising a new 4,278 sq m cinema and 2,457 sq m of restaurant and café space.

Conclusions

- 4.61 Nexus conducted health checks across each of Huntingdonshire's primary town centres, analysing customers' behaviour, retailer representations, pedestrian flows, accessibility, the perception of safety, environmental quality, as well as any changes in vacancy rates and the composition of retail/ service facilities before, during and after the recession.
- 4.62 The findings indicate that the majority of the centres are fulfilling their designated roles and function as expected for their position in the District's retail hierarchy (as defined in the Local Plan). The Centres as a collective experienced very little change in their retail composition since the 2013 and 2010 retail studies were undertaken. All four town centres show different strengths, with Huntingdon providing a particularly strong comparison goods offer, St Neots

offering a wide range of convenience foodstores and St Ives demonstrating a healthy night time economy and market offer. Although smaller than the other three centres, Ramsey has a particularly strong offer of independent traders, providing an important service role to local residents.

- 4.63 Of note, each of the key town centres has at least one large format multi-channel anchor supermarket either in, or in close proximity to the core of the centre. These large stores offer a variety of goods and services, and often draw a large number of visitors to the town centres, although notably the Tesco Extra and Co-op at Ramsey are not currently located within the defined town centre boundaries.
- 4.64 A number of retail developments are currently proposed across the District's neighbouring authorities, including a number of local plan site allocations. Of particular significance is the large retail and leisure complex at 'Rushden Lakes' (East Northamptonshire District), located within 20 miles of both Huntingdon and St Neots. The complex is set to open in 2017 and will undoubtedly have a significant impact on many surrounding local authority areas.

5.0 Population and Expenditure

Introduction

- 5.1 We identify below how we assess the current population and available convenience and comparison retail expenditure within the Study Area, as well as the methodology for forecasting the available expenditure across the plan period. This data has informed our quantitative model of available retail capacity in the Study Area, along with the NEMS Market Research household telephone survey, which we go on to discuss in Section 6.

Study Area

- 5.2 A key task of this Study is to review previous findings relating to shopping patterns within the local area, most notably the household surveys undertaken to inform the previous Deloitte Retail Study produced in 2013 and the Roger Tym & Partners (RTP) Retail Development Advice produced in 2010, identifying any significant variations in shopping patterns over the past six years that may have resulted from recent retail investments in the vicinity of the Study Area or wider changes in nationwide shopping habits.
- 5.3 The previous studies comprised of 12 zones which broadly covered the Huntingdonshire District boundary, as well as surrounding areas within Bedford and Cambridgeshire where shoppers may be attracted to Huntingdonshire's retail and leisure offer.
- 5.4 Nexus has broadly adopted the same study area as the previous studies in order to enable before and after comparisons and to allow us to robustly identify any emerging trends in shopping patterns across the Study Area.
- 5.5 There has, however, been a minor amendment to the definition of Zone 2 (previously, defined as South East Huntingdon) to give two sub-zones within it. This split enables further assessment of the shopping patterns of the residents of Godmanchester (Zone 2b) and the settlements of Hemingford Grey and Hemingford Abbots (Zone 2b) who will be drawn to Huntingdon and St Ives for their main retail needs to varying degrees.
- 5.6 Figure 5.1 shows the geographical extent of the Study Area (**Appendix A**), whilst Figure 5.2 shows the definitions of the survey zones by postal sector.

Figure 5.1 | Survey Area Zones

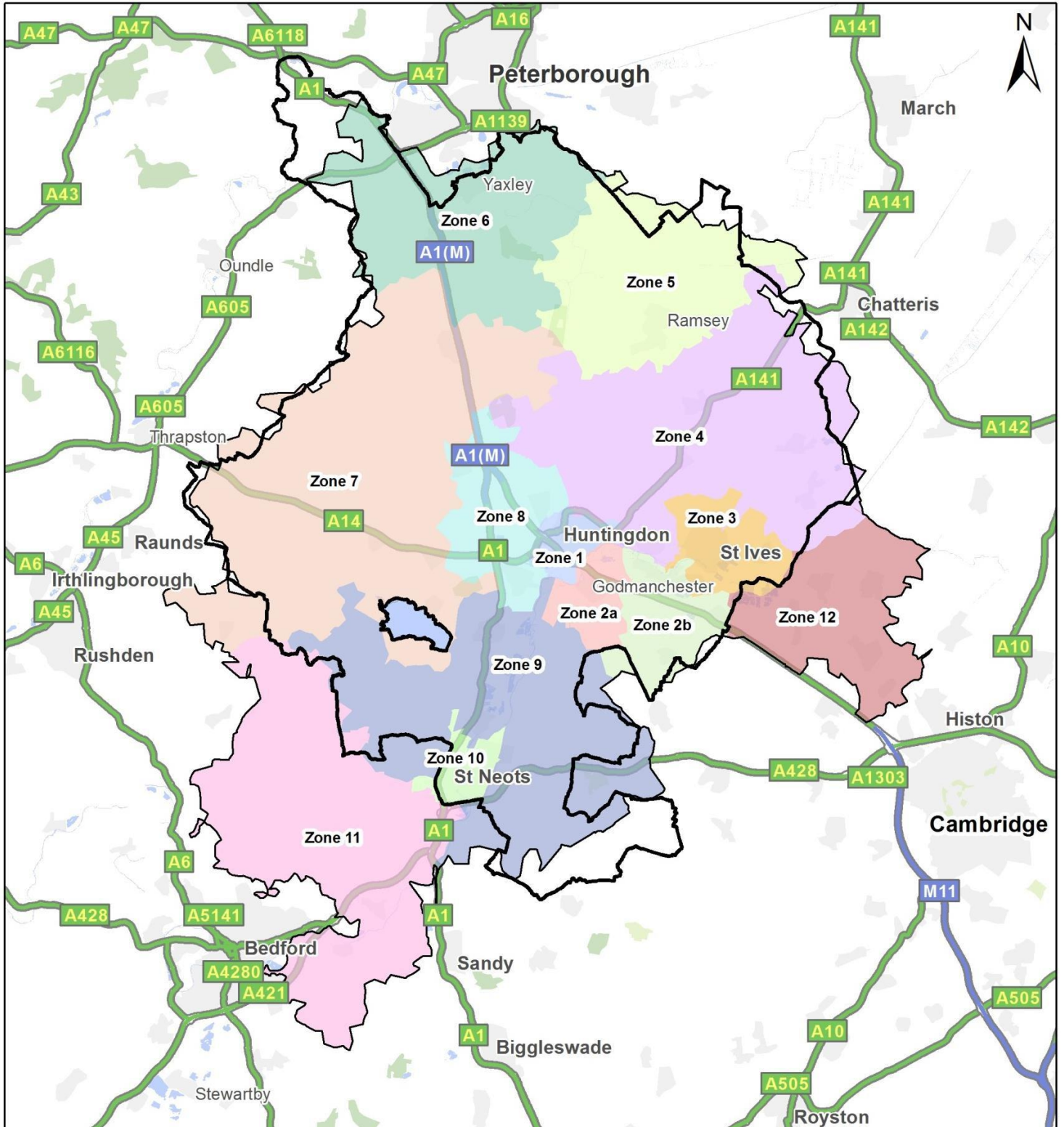


Figure 5.2 | Definitions of Survey Area Zones

Survey Zone	Postcode Sectors
Zone 1 Huntingdon	PE29 (1, 3, 6 & 7)
Zone 2a Godmanchester	PE29 2
Zone 2b St Ives Fringe	PE28 9
Zone 3 St Ives	PE27 (3, 4, 5 & 6)
Zone 4 North East Huntingdon	PE28 (2 & 3)
Zone 5 Ramsey	PE26 (1 & 2)
Zone 6 South Peterborough	PE7 3
Zone 7 Sawtry	PE20 (0 & 5)
Zone 8 West Huntingdon	PE28 4
Zone 9 South Huntingdon	PE19 (5 & 6)
Zone 10 St Neots	PE19 (1, 2, 7 & 8)
Zone 11 North Bedford	MK44 (2 & 3)
Zone 12 North West Cambridge	CB24 (3, 4 & 5)

Study Area Population

- 5.7 Nexus has been provided with population forecasts by ward prepared by Cambridgeshire Research Group (February 2015), the central research and information section of Cambridgeshire County Council to calculate the baseline population data (base year 2013) and population forecasts for Zones 1-10 across Huntingdonshire District.
- 5.8 Cambridgeshire Research Group's population forecasts utilise the 2011 Census release, projected forward using growth rates allowing for births, deaths and migration, split by current age and gender estimates and divided by ward across Cambridgeshire. This ward level data has been assigned to each of the Zones 1-10 across the District on the basis of the location of the residential settlements.
- 5.9 This data also incorporates urban expansions in order to account for the proposed increase in population resulting from planned housing developments. Since Bedford was not part of Cambridgeshire Research Group's research and South Cambridgeshire's housing allocations have not been fully examined through the formal planning process and are not yet adopted, we have utilised data sourced from the Experian Micromarketer G3 system to calculate the baseline population data (2015 estimates) to calculate population projections for Zones 11 (Bedford) and 12 (South Cambridgeshire).
- 5.10 Experian's population dataset utilises the 2011 Census release, projected forward by Experian using growth rates derived from Office for National Statistics population projections and current age and gender estimates.

- 5.11 We have taken a base date of 2016 (the year of the Study), calculating population and retail expenditure forward to 2021, 2026, 2031 and 2036 in accordance with Huntingdonshire's emerging Local Plan and NPPF guidance.
- 5.12 Cambridgeshire Research Group's population forecasts include projected housing increases resulting from the proposed developments of Huntingdonshire's three Strategic expansion locations in the emerging Local Plan.
- 5.13 Alconbury Weald (Proposed Allocation SEL1) is located within Zone 8 and is proposed to provide approximately 5,000 homes. Cambridgeshire Research Group incorporates this additional population as a phased approach from 2021 onwards.
- 5.14 The new residents resulting from the approximately 3,820 homes proposed in the Eastern Expansion, St Neots (SEL2) are located in Zone 10 from 2021 onward.
- 5.15 Wyton-on-the-Hill (SEL3) proposes approximately 4,500 new homes within Zone 4 from 2026 onwards.
- 5.16 At 2016, the Study Area is estimated to contain a resident population of approximately 204,100, rising by 18.2% to 241,332 at 2036 (equating to 37,232 additional residents).

Figure 5.3 | Population across the Study Area by Zone

Zone	2016	2021	2026	2031	2036
Zone 1 Huntingdon	24,200	27,280	27,510	27,140	28,450
Zone 2a Godmanchester	6,810	8,470	8,500	8,430	8,600
Zone 2b St Ives Fringe	10,020	10,520	10,460	10,550	10,330
Zone 3 St Ives	23,360	24,050	23,630	23,600	24,140
Zone 4 North East Huntingdon	15,930	17,360	20,150	22,920	24,450
Zone 5 Ramsey	8,720	9,120	9,000	9,040	9,070
Zone 6 South Peterborough	16,980	16,870	16,540	16,440	15,880
Zone 7 Sawtry	10,300	10,540	10,430	10,470	10,190
Zone 8 West Huntingdon	11,960	16,160	20,530	23,040	23,080
Zone 9 South Huntingdon	15,320	15,340	15,240	15,360	14,940
Zone 10 St Neots	34,100	37,990	40,340	41,270	40,990
Total HDC	177,700	193,700	202,330	208,260	210,120
Zone 11 North Bedford	10,517	10,983	11,438	11,840	12,169
Zone 12 North West Cambridge	15,883	16,863	17,738	18,406	19,043
Total	204,100	221,546	231,506	238,506	241,332

Source: Appendix D, Table A1

- 5.17 The resident population (and by extension, the resident expenditure available to facilities within Huntingdonshire) is not distributed evenly across the Zones of the defined Study Area, which is to be expected of any sample of a population. This is because residential housing is

typically focussed towards urban areas within the zones and across the Study Area. By way of an example, 16.7% and 11.9% of the residents across the Study Area reside in Zone 10 (St Neots) and Zone 1 (Huntingdon) respectively, whilst the zone with the lowest proportion of residents was 2a (Godmanchester) with 3.3%.

- 5.18 Cambridgeshire Research Group proportionately distributes population growth cumulatively on the basis of change by age group across the constituent wards, which we have combined to broadly match the Study Area Zones. In some localised instances such as in Ramsey and South Peterborough, the population across younger age groups is predicted to decline⁶⁵, presumably due to a net increase in outmigration. Nonetheless, population growth is forecast across all age bands for District and Study Area as a whole by the end of the study period.

Retail Expenditure

- 5.19 Retail expenditure data (in the form of convenience and comparison goods expenditure per capita) has been sourced from the in-house Experian Micromarketer G3 system.
- 5.20 The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry.
- 5.21 Expenditure data from Experian is provided at a base year of 2014 in 2014 prices (as is every subsequent monetary value) and has been projected forward using per capita growth forecasts derived from the latest Experian Planner Briefing Note 13 (October 2015).
- 5.22 As identified in Figure 5.4, Experian forecasts suggest that convenience goods expenditure has fallen in 2014 and (to a lesser extent) 2015, as a result of a trend towards more price conscious shopping patterns and the growth of high street discounters such as Lidl and Aldi, as discussed in further detail in Section 2. Marginal growth is now anticipated in the convenience goods sector with a consistent 0.1% growth per annum forecast over the period 2018-2035.
- 5.23 Comparison expenditure is shown to have risen by 5.5% and 5.3% in 2014 and 2015 respectively, before levelling off between 2018 and 2022. Experian forecasts a steady growth of 3.2% per annum over the period 2023-2032 as comparison retailers incorporate newer technologies, innovations and formats (including 'click and collect') in order to respond to the increasing competition from internet shopping.

⁶⁵ Population Forecasts 2013 Districts and Wards, Cambridgeshire Research Group, February 2015

- 5.24 Experian note that long term forecasts should be treated with caution and subject to regular reviews, given the wide range of factors that can impact on the broader national economy.

Figure 5.4 | Retail Expenditure Forecasts for Huntingdonshire

Year	Convenience growth rates	Comparison growth rates
2014	-1.8%	5.5%
2015	-0.2%	5.3%
2016	0.1%	3.2%
2017	0.3%	2.9%
2018	0.1%	3.0%
2019	0.1%	3.0%
2020	0.1%	3.0%
2021	0.1%	3.0%
2022	0.1%	3.0%
2023	0.1%	3.2%
2024	0.1%	3.2%
2025	0.1%	3.2%
2026	0.1%	3.2%
2027	0.1%	3.2%
2028	0.1%	3.2%
2029	0.1%	3.2%
2030	0.1%	3.2%
2031	0.1%	3.2%
2032	0.1%	3.2%
2033	0.1%	3.2%
2034	0.1%	3.2%
2035	0.1%	3.2%
2036*	0.1%	3.2%

Source: Table 1a, Experian Retail Planner Briefing Note 13, October 2014

* Published expenditure growth rates are not available for 2036, so growth is assumed to remain at 2035 levels

Non-Store Retailing or Special Forms of Trading

- 5.25 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies and are discussed in detail in 'Growth in E-Tailing (or E-Commerce)' in Section 2.
- 5.26 Experian Retail Planner Briefing Note 13 (October 2015) provides estimated forecasts of internet and other SFT, which allows for us to 'strip out' any expenditure that survey respondents suggest is made by SFT and instead utilise Experian's forecasts. This ensures that the proportion of SFT accounted for in our modelling increases in line with Experian forecasts as opposed to remaining constant at current levels.
- 5.27 Many stores offer online sales, but source goods from regular stores' stock as is often the

case for foodstores where employees will carry out online orders from stores' shelves each morning before they open to the general public. These orders are then delivered by dedicated vans at each store and as such the online expenditure is attributed to tangible stores. Experian provides 'adjusted' figures, cited at Figure 5.5, which make an allowance for these online sales derived from individual stores so as to ensure that the expenditure is counted as 'available' spend within the Study Area.

Figure 5.5 | 'Adjusted' Special Forms of Trading Market Share Forecasts

Year	Convenience SFT growth rates	Comparison SFT growth rates
2016	3.0%	12.4%
2021	4.4%	15.0%
2026	5.1%	15.0%
2031	5.8%	14.0%
2036*	6.4%	14.3%

Source: Appendix F, Experian Retail Planner Briefing Note 13, October 2014

* Published SFT forecasts are not available for 2036, so growth is assumed to remain at 2035 levels

Convenience Goods Expenditure

5.28 Projecting forward available expenditure per capita and population growth for each survey zone in 2016, 2021, 2026, 2031 and 2036, we are able to estimate the total available convenience and comparison goods expenditure.

Figure 5.6 | Total Available Convenience Goods Expenditure across the Study Area

2016	2021	2026	2031	2036	Growth 2016-2036
£422.9 m	£454.7 m	£473.8 m	£487.1 m	£492.1 m	£69.2 m

Source: Table 2a, Appendix F

5.29 As identified in Figure 5.6, in 2016 it is estimated that the resident population of the Study Area spent £422.9m on convenience goods, which is expected to increase by £69.2m (16.4%) to £492.1m by 2036.

5.30 For the purpose of the Study this total available convenience expenditure is split across two sub-categories, with a Study Area average of 81% of spending attributed to main food shopping trips and 19% attributed to 'top-up' shopping trips (as derived from the NEMS Household Survey on a zone by zone basis).

Comparison Goods Expenditure

5.31 Experian provides comparison goods expenditure divided into eight sub-categories to allow

for more detailed investigations of available expenditure. Bulky goods categories include 'DIY', 'Electrical' and 'Furniture', while non-bulky goods are made up of 'Books, CDs and DVDs', 'Chemist Goods', 'Clothing & Footwear', 'Small Household Goods' and 'Toys and Recreational Goods'.

Figure 5.7 | Total Available Comparison Goods Expenditure across the Study Area

2016	2021	2026	2031	2036	Growth 2016-2036
£605.0 m	£736.4 m	£899.5 m	£1,099.0 m	£1,296.8 m	£691.8 m

Source: Table 8, Appendix F

- 5.32 Applying the increases in population and comparison goods expenditure per capita, Figure 5.7 estimates that the resident population of the Study Area generated £605.0m of comparison goods expenditure in 2016, rising to £1,296.8m in 2036 (an increase of £691.8m or 114%).

Summary

- 5.33 The Study Area has a resident population of 204,100 at 2016, rising to 241,332 by 2036. It is estimated that, at 2016, the population generates £422.9m (convenience goods) and £605.0m (comparison goods) of retail expenditure, which is expected to increase to £492.1m and £1,296.8m (respectively) at 2036.
- 5.34 The base data in this section is then utilised, in conjunction with our analysis of the market shares of retailers across the Study Area in Section 6 below, to inform our subsequent analysis of retail expenditure capacity in Section 7.

6.0 Original Market Research

Introduction

- 6.1** In carrying out this Study, we have gathered empirical evidence through undertaking a household telephone survey of 1,000 respondents in June 2016 in order to provide up-to-date information on local shopping patterns across the Survey Area, including the trade draws of particular town centres, leisure destinations and both outdoor and indoor markets.
- 6.2** Nexus has partnered with specialist consultancy NEMS Market Research Ltd in order to identify shopping patterns, preferences and trends through a comprehensive household telephone survey of residents across the Study Area. This data provides the underlying structure of our quantitative retail capacity modelling, which is used to calculate the capacity for new retail floorspace across the Study Area over the plan period.
- 6.3** It is acknowledged that there are potential limitations with such datasets, which are restricted by the number of surveys that can be carried out across the Study Area, as well as the length of the household questionnaire itself. The results of the survey were then weighted according to the population profile in each zone, as set out in Section 1.4 at **Appendix C**. As such, the results are understood to provide a broad, representative indication of the market shares of retail and leisure destinations across the Study Area.

Household Telephone Survey

- 6.4** The previous Deloitte and RTP studies utilised a household telephone survey undertaken by NEMS Market Research (October 2009) across a Study Area of 12 zones.
- 6.5** We have broadly adopted the previous Study Area (with the exception of Zone 2, which has been divided into 2 separate zones) in order to allow for comparisons and better assess the local trends in shopper preferences between 2010 and 2016.
- 6.6** The shopping patterns that result from the household survey provide the basis of the calculations of the retail expenditure at each retail destination by extrapolating the total available expenditure provided by Experian MMG3 (as discussed in Section 5, above). The household survey also provides details of linked trips between various destinations, the use of other town centre facilities, the most popular means of travel to each centre and the frequency of visits.
- 6.7** As noted above, a limitation of the household survey is that the results may underestimate trade to smaller centres and retail facilities. In order to counter this, we ask respondents for

the destination that they last made a purchase so as to record more infrequent purchases including drive-by and impulse shopping that are more likely to be at smaller centres and stand-alone stores.

- 6.8** The full tabulations of the results of the household telephone survey are provided at **Appendix C**.

Convenience Shopping Patterns

- 6.9** The RTP Retail Study 2010 identified that (based on October 2009 household survey data), 72.1% of the total convenience goods expenditure generated within the Study Area was spent within Huntingdonshire District. Our updated household telephone survey indicated that this has marginally fallen to 70.3%, as of June 2016.
- 6.10** Focussing on each town centre individually Figure 6.1 shows the convenience goods market shares for facilities within the town centre boundaries of each of the District's market town centres. It also shows the share across the wider zone (including the town centre percentages) so as to account for edge-of-centre and out-of-centre facilities.

Figure 6.1 | Convenience Goods - Study Area Market Share (%)

Destination	2010	2016
Huntingdon Town Centre	12.7%	10.2%
Zone 1 (Huntingdon)	15.3%	19.7%
Tesco Extra, Abbots Ripton Road (Zone 4)	14.6%	10.2%
St Neots Town Centre	9.0%	7.1%
Zone 10 (St Neots)	21.6%	21.7%
St Ives Town Centre	8.1%	7.1%
Zone 3 (St Ives)	11.0%	9.6%
Ramsey Town Centre	0.5%	0.1%
Zone 5 (Ramsey)	3.4%	3.9%
Huntingdonshire District	72.1%	70.3%

Source: Appendix D and RTP, Retail Study 2010 (Spreadsheet 14)

- 6.11** Since 2010 there has been a small drop in convenience market shares across the District's Town Centres, while across the wider zones (with exception of St Ives) there has been a gain in convenience market shares which would indicate a trend towards increased convenience shopping in edge-of-centre and out-of-centre stores.
- 6.12** The majority of convenience expenditure in Huntingdon is spent at the Tesco Extra on the northern edge of Huntingdon which attracts 10.2% of all convenience shopping in the Study Area, followed by the town centre anchor Sainsbury's (6.2%), then the Tesco Express at Stukeley Meadows (4.9%) and Lidl (4.6%).

- 6.13** Tesco Extra on Barford Road (10.6%) had the greatest market share in Zone 10 (St Neots) by a large margin, followed by the Waitrose (2.8%) and Lidl (2.1%) in the town centre and the out-of-centre Aldi at Howard Road in Eaton Socon (2.6%). The market share of convenience expenditure has remained relatively constant across Zone 10 (including edge-of-centre and out-of-centre facilities) in the six years since the previous household survey, whilst the draw of town centre convenience stores has fallen.
- 6.14** Since 2010, St Ives has seen a drop in convenience market share in both the town centre (8.1% to 7.1%) and across the wider St Ives Zone 3 (11.0% to 9.6%). Waitrose remains a significant town centre anchor with a 6.6% market share of convenience goods spend across the Study Area. Over the same period the market share of Ramsey Town Centre has fallen from 0.5% (2010) to 0.1% (2016), while the market share of convenience facilities across Zone 5 (Ramsey) has risen from 3.4% to 3.9% over the same period reflecting the impact of Tesco's opening in February 2010.

Figure 6.2 | Convenience Goods - Shopping Patterns by Zone (%)

Zones	Huntingdon Zone 1		St Neots Zone 10		St Ives Zone 3		Ramsey Zone 5		Others		Total	
	2010	2016	2010	2016	2010	2016	2010	2016	2010	2016	2010	2016
1	48	53	3	1	1	0	0	0	48	46	100	100
2a	33	57	1	1	25	0	0	0	42	42	100	100
2b		19		3		34		0		43		100
3	9	19	3	0	61	52	0	0	27	29	100	100
4	16	29	5	2	22	16	5	5	52	48	100	100
5	3	4	6	0	0	1	48	80	43	15	100	100
6	1	1	0	0	0	0	0	1	99	98	100	100
7	15	29	18	6	0	0	0	0	67	64	100	100
8	42	51	14	4	1	0	0	0	43	45	100	100
9	17	16	53	56	0	0	0	0	31	29	100	100
10	2	3	87	94	0	0	0	0	11	3	100	100
11	0	1	23	20	1	0	0	0	75	79	100	100
12	2	2	0	0	5	5	0	0	92	92	100	100
Total	15	20	22	22	11	10	3	4	49	45	100	100

Source: Appendix D and RTP, Retail Study 2010 (Spreadsheet 13)

- 6.15** Figure 6.2 identifies the shifting patterns of market shares in each of the key zones over the period 2010-2016. Important to note is that these are zonal market shares and not just town - centre market shares (i.e. they incorporate all edge and out-of-centre provision too).
- 6.16** This data is useful in identifying changing trends across the Study Area but, as population and retail expenditure vary considerably from zone to zone, Figure 6.2 on its own does not provide the complete picture when assessing the overall draw of the centres.

- 6.17** Nevertheless, it is clear that the Huntingdon areas accounts for a significant proportion of spend across Zones 1 (Huntingdon), 2a (Godmanchester), 7 (Sawtry) and 8 (West Huntingdon) as well as a notable share of Zones 3 (St Ives), 4 (North East Huntingdon) and 9 (South Huntingdon).
- 6.18** Convenience goods expenditure in Huntingdon from Zone 4 (North East Huntingdon) and Zone 7 (Sawtry) has almost doubled since the RTP Study in 2010, drawing an increased proportion of residents from St Ives and St Neots respectively.
- 6.19** St Neots has further increased its retention of convenience spend from residents of Zone 10 (St Neots), rising from 87% to 94% since 2010, while maintaining a notable share of convenience expenditure from Zones 9 (South Huntingdon) and 11 (North Bedford). Since 2010, St Neots has experienced a reduction in the proportion of convenience goods spend from residents of Zones 7 (Sawtry) and 8 (West Huntingdon).
- 6.20** Elsewhere in the Study Area, the Tesco Extra at Abbots Ripton Road on the northern edge of Huntingdon captured a convenience goods market share of 10.2% of Study Area spending (down from 14.6% in 2010), which equates to 42.0% of convenience spending of residents of Zone 1 (Huntingdon). This remains a significant out-of-centre convenience draw, located just 10 minutes from Huntingdon Town Centre by car.
- 6.21** Residents of Zones 3 (St Ives) and 4 (North East Huntingdon) both predominantly visit St Ives for their convenience goods shopping. However, the proportion of convenience goods expenditure spent in St Ives from each zone has fallen over the past six years.
- 6.22** Residents of Zone 5 (Ramsey) primarily shop in Ramsey and its market share of its own zone has grown very significantly from 48% in 2010 to 80% in 2016.

Comparison Shopping Patterns

- 6.23** Figures 6.3 and 6.4 identify the market share of comparison goods spending broken down by town centre and zonally, comparing the results of the 2010 and 2016 household surveys. In 2016, it was found that Huntingdonshire District claimed 45.0% of comparison goods expenditure across the Study Area, decreasing from 50.4% in 2010.
- 6.24** Broken down by town centre, Figure 6.3 identifies that the comparison expenditure market shares of Huntingdon, St Neots and St Ives fell from their 2010 market shares, Huntingdon Town Centre has notably fallen from 20.9% of all comparison goods spending in 2010 to 13.7% in 2016. Ramsey Town Centre marginally increased its comparison goods market share from 1.0% in 2010 to 1.1% in 2016.

- 6.25** A similar pattern emerged across the wider zones of Huntingdon, St Neots, St Ives and Ramsey (incorporating edge and out-of-centre retailers) with the three larger towns all falling from their 2010 market shares.

Figure 6.3 | Comparison Goods - Study Area Market Share (%)

Destination	2010	2016
Huntingdon Town Centre	20.9%	13.7%
Zone 1 (Huntingdon)	28.0%	22.8%
St Neots Town Centre	10.5%	9.8%
Zone 10 (St Neots)	12.5%	11.8%
St Ives Town Centre	7.3%	6.0%
Zone 3 (St Ives)	7.3%	6.0%
Ramsey Town Centre	1.0%	1.1%
Zone 5 (Ramsey)	1.0%	1.2%
Huntingdonshire District	50.4%	45.0%

Source: Appendix D and RTP, Retail Study 2010 (Spreadsheet 6)

Figure 6.4 | Comparison Goods - Shopping Patterns by Zone (%)

Zones	Huntingdon Zone 1		St Neots Zone 10		St Ives Zone 3		Ramsey Zone 5		Others		Total	
	2010	2016	2010	2016	2010	2016	2010	2016	2010	2016	2010	2016
1	67	57	1	0	2	2	0	0	30	41	100	100
2a	40	59	1	1	15	2	0	0	44	38	100	100
2b		28		0		16		0		55		100
3	28	23	0	1	35	27	0	0	37	49	100	100
4	43	34	1	0	16	11	1	1	39	53	100	100
5	32	16	0	0	1	1	14	27	52	56	100	100
6	2	1	0	1	0	0	0	0	98	98	100	100
7	31	32	10	2	1	1	0	0	57	66	100	100
8	52	48	2	1	1	2	0	0	45	49	100	100
9	22	20	38	36	1	1	0	0	40	43	100	100
10	7	3	54	50	0	1	0	0	39	47	100	100
11	1	0	14	15	0	0	0	0	86	85	100	100
12	13	10	0	0	6	4	0	0	81	86	100	100
Total	28	23	13	12	7	6	1	1	51	58	100	100

Source: Appendix D and RTP, Retail Study 2010 (Spreadsheet 5)

- 6.26** As identified in Figure 6.4, Huntingdon, St Neots, St Ives and Ramsey captured the greatest proportion of comparison expenditure market share across their own Zones 1 (Huntingdon), 10 (St Neots), 3 (St Ives) and 5 (Ramsey). Huntingdon also continued to capture the greatest proportion of comparison goods spending from residents of the remaining zones across the Study Area, with the exception of Zones 9 (South Huntingdon) and 11 (North Bedford) to the south of the District where residents predominantly visited St Neots.

- 6.27** Huntingdon has seen a fall in market share of comparison expenditure across each zone, likely due to lack of comparison retail investment over the period, in addition to the increased draw of Cambridge (as discussed at Paragraph 6.51); with spend from Zone 5 (Ramsey) in particular having halved since 2010,
- 6.28** St Neots is shown to have maintained a relatively constant market share of residents' comparison goods spending across the zones since 2010 while St Ives has seen a reduction in market share across each zone. Ramsey only claims a comparison market share greater than 1% from Zone 5, has seen the proportion of expenditure from the zone almost double from 14% in 2010 to 27% in 2016.)

Market Share Analysis

Figure 6.5 | All Retail - Market Share by Destination (%)

Destination	Market Share by Category (%)												Total Market Share (all retail)
	Convenience Spending			Comparison Spending									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
Huntingdon	21.2	13.4	19.7	11.4	18.6	28.6	27.1	18.0	22.8	47.4	23.5	22.8	21.5
St Neots	21.1	20.4	21.0	5.4	14.4	11.3	14.1	20.3	14.8	24.6	9.2	11.8	15.6
St Ives	8.4	14.7	9.6	4.6	10.5	4.7	3.2	16.9	4.8	3.9	12.0	6.0	7.5
Ramsey	3.4	6.1	3.9	0.3	1.1	1.0	1.3	2.4	2.3	0.4	2.2	1.2	2.3
Others in Huntingdonshire	13.8	25.6	16.0	0.4	5.1	2.9	3.5	16.4	4.1	3.6	1.7	3.1	8.4
Huntingdonshire Sub-Total	68.0	80.3	70.3	22.1	49.7	48.6	49.2	74.0	48.7	79.9	48.5	45.0	55.4
Others in Study Area	0.1	5.8	1.2	0.0	0.0	0.0	0.0	1.9	0.0	1.5	0.1	0.2	0.6
Outside the Study Area	31.9	13.9	28.5	77.9	50.3	51.4	50.8	24.0	51.3	18.6	51.3	54.8	44.0
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	100.0

Source: Appendix D

Convenience Goods

- 6.29** Convenience spending is categorised by Experian as low-cost, everyday food, beverages and perishable items that consumers are unlikely to be willing to travel far to buy. Convenience shopping trips are divided into two sub-categories, main food shopping and

top-up shopping, which is more likely to be sourced locally to resident's homes or place of work.

- 6.30** Across the Study Area, Figure 6.5 illustrates that Huntingdonshire caters for 68.0% of main food trips and 80.3% of top-up trips. The majority of main food expenditure is spent in Huntingdon and St Neots (21.2% and 21.1% respectively), while St Ives receives 8.4% and Ramsey just 3.4%.
- 6.31** Huntingdon is identified as having a lower top-up market share (13.4%) than main food, while the proportion of spending on top-up shopping in St Neots is marginally less (20.4%) than on main food shopping. Notably, due in part to the variety of convenience goods offer and the number of national multiple operators, St Neots caters for a greater total convenience market share than Huntingdon, St Ives and Ramsey.
- 6.32** St Ives (14.7%) and Ramsey (6.1%) both cater for a greater proportion of top-up spending than on main food, reflecting the smaller convenience offer in each centre.

Comparison Goods

- 6.33** Experian provides expenditure estimates divided into eight sub-categories of comparison goods, which can be grouped as bulky goods: 'DIY', 'Electrical' and 'Furniture', and non-bulky goods: 'Books, CDs and DVDs', 'Chemist Goods', 'Clothing & Footwear', 'Small Household Goods' and 'Toys and Recreational Goods'.
- 6.34** As identified in Figure 6.5, Huntingdon captures a greater comparison goods market share than St Neots, St Ives and Ramsey for all Experian comparison goods market shares with the exception of chemist goods, where St Neots draws over a fifth of all chemist spending across the Study Area. St Neots is also identified as catering for a wide mix of comparison goods shopping (with the exception of clothing and furniture) due in part to a strong presence of independent traders in the town centre.
- 6.35** Huntingdon is shown to be bringing in a significant market share of 47.4% of all DIY expenditure across the Study Area, due to the presence of both Stukeley Road and Huntingdon Retail Parks which together cater for 31.2% of DIY spending across the Study Area.
- 6.36** St Ives serves a more specialist comparison goods market, with notable market shares of books and media (10.5%), chemist goods (16.9%) and furniture (12.0%).
- 6.37** Ramsey provides a limited comparison goods offer, only showing market shares of chemist, electrical and furniture goods expenditure greater than 2% of the Study Area.

Market and Farmers Markets

- 6.38** The household survey asked respondents questions around the use of the District's street and farmers markets, as well as other popular markets across the sub-region. Across the Study Area, 60% of all residents had visited a local street market or farmers market in Huntingdonshire District over the preceding 2 months.

Figure 6.6 | Markets - Market Share by Destination (%)

Destination	Which market do you visit the most? (%)
Huntingdon, street market	16.8
Huntingdon, farmers market	6.7
St Ives, street market	31.2
St Ives, farmers market	11.1
St Neots, street market	17.8
St Neots, farmers market	9.9
Ramsey, street market	2.6
<i>Others outside District</i>	3.9
Total	100.0

Source: Appendix C

- 6.39** 31% of all respondents who had visited a market in the preceding 2 months visited the St Ives Street Market most frequently. This was almost double that of the St Neots Street Market, the second most frequented market at 18%. St Ives was also home to the most popular Farmers Market (with a market share of 11%), again followed by the St Neots Farmers Market (10%).
- 6.40** Of those who visited markets, 56% of respondents undertake 'linked' shopping during their trips to markets. Of these linked shopping trips, 26% of trips were for non-food shopping and 9% of trips were linked with food shopping. St Ives retained most shopping trips linked with visits to markets (34%), followed by St Neots (32%) and Huntingdon (30%).

Local specialist shop usage

- 6.41** The household survey identified that 36% of all respondents across the Study Area undertook additional convenience shopping trips to local specialist food shops, such as butchers, bakers and greengrocers. Of those that undertook local specialist food shopping, Figure 6.7 identifies the location of the local specialist destination.

Figure 6.7 | Specialist Convenience Goods - Market Share by Destination (%)

Destination	Specialist Convenience Shopping Market Share (%)
Zone 1	
Huntingdon Town Centre	11.3
Zone 2A	
Godmanchester Village Centre	3.9
Zone 2B	
Fenstanton Village Centre	4.6
Other - Zone 2B	0.7
Zone 3	
St Ives Town Centre	8.7
Zone 4	
Somersham Village Centre	2.0
Old Hurst Village Centre	1.4
Other - Zone 4	4.7
Zone 5	
Ramsey Town Centre	6.5
Other - Zone 5	0.9
Zone 6	
Yaxley Village Centre	5.3
Zone 7	
Sawtry Village Centre	0.2
Kimbolton Village Centre	2.4
Zone 8	
Brampton Village Centre	10.5
Zone 9	
Buckden Village Centre	7.8
Great Staughton Village Centre	1.1
Other - Zone 9	1.4
Zone 10	
Eaton Socon District Centre	0.6
St Neots Town Centre	11.7
Huntingdonshire Sub-Total	85.5
Zone 11	
Other - Zone 11	1.0
Zone 12	
Willingham Village Centre	4.9
Other - Zone 12	0.8
Other	7.9
Total	100.0

Source: Appendix C

- 6.42** The majority of local specialist food shopping was carried out in St Neots (11.7%) and Huntingdon (11.3%), whilst St Ives and Ramsey each had a local specialist food shopping market share of 8.7% and 6.5% respectively.
- 6.43** Notably, however, the smaller village centres of Brampton and Buckden accounted for a relatively significant market shares of 10.5% and 7.8% respectively, suggesting that these centres serve a key role in supporting the local convenience goods market and that residents

across the Study Area are willing to travel to smaller village centres in order to source specialist food goods from independent local butchers, bakers and greengrocers.

E-tailing (or Special Forms of Trading)

6.44 As noted in Section 5, NEMS 'strips out' local responses to the household survey (**Appendix C**) that are made by Special Forms of Trading (SFT), including online shopping, in favour of SFT spending forecasts by Experian, which utilises UK Office of National Statistics (ONS) data sources. This enables us to take account of Experian's projected increases in the proportion of SFT spending over time, as opposed to remaining constant at current levels. However, the results of the household survey are provided at Figure 6.8 for comparison.

Figure 6.8 | E-tailing - Market Share by Location of Household (%)

Zone	Proportion of E-tailing by Category (%)												Total E-tailing (all retail)
	Convenience Goods			Comparison Goods									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
Zone 1	4.3	0.0	3.5	13.4	76.9	25.4	32.1	10.5	49.8	0.0	20.6	27.7	17.8
Zone 2a	14.4	0.0	11.7	16.6	70.1	33.8	37.7	1.6	39.7	5.1	27.1	29.6	22.2
Zone 2b	7.9	0.0	6.4	14.2	64.0	10.5	42.5	7.3	36.8	11.0	14.0	23.4	16.4
Zone 3	15.5	0.0	12.6	27.7	85.6	29.7	50.2	8.6	44.3	3.9	13.0	33.6	25.0
Zone 4	6.2	0.0	5.0	24.5	72.2	26.3	50.3	8.6	27.6	1.9	9.6	28.3	18.7
Zone 5	1.0	0.0	0.8	10.5	67.6	19.2	43.7	5.7	30.7	0.0	5.6	22.1	13.3
Zone 6	6.3	0.0	5.1	10.3	62.9	23.7	39.3	3.4	24.9	3.8	3.9	21.1	14.5
Zone 7	7.7	0.0	6.2	19.1	74.9	22.4	53.7	13.7	60.0	15.2	18.6	33.8	22.4
Zone 8	3.8	0.0	3.1	24.9	58.6	29.8	53.6	6.7	43.9	5.2	26.4	33.1	20.7
Zone 9	7.4	0.0	6.0	10.2	77.4	42.3	40.2	1.1	67.9	8.2	34.5	35.8	23.6
Zone 10	0.0	0.0	0.0	20.6	74.9	14.0	40.3	0.8	30.1	1.0	13.7	24.1	14.2
Zone 11	4.3	2.6	4.0	19.6	72.1	34.9	45.3	7.1	38.6	2.2	13.5	30.2	19.4
Zone 12	10.1	1.1	8.4	24.2	49.5	33.8	39.2	5.8	38.0	9.3	17.9	29.6	20.9
Total E-tailing market share	6.3	0.2	5.1	18.5	71.2	25.5	43.2	6.1	39.7	4.4	15.8	28.2	18.7

Source: NEMS Market Research Household Survey data (June 2016)

- 6.45** Figure 6.8 identifies the current proportion of online spending for both convenience (5.1%) and comparison goods (28.2%) across each zone. The Experian SFT forecasts for 2016 show the proportion of SFT as 3.0% of convenience goods spending (adjusted to remove internet sales that are derived from individual stores) and 12.4% of comparison goods spending (adjusted).
- 6.46** Spatially, across the Study Area, Zones 3 and 2a recorded the highest levels of online convenience shopping, whilst convenience e-tailing was lower in Zones 1, 2b, 4, 6, 7, 8, 9, 11 and 12, and significantly lower in Zones 5 and 10. This is likely due to residents across Huntingdonshire taking up online shopping to supplement convenience spending in physical stores where there is not a varied and easily accessible local offer.
- 6.47** The variation in the proportion of online spending between the zones is often associated with the gaps in the offer of physical stores and the availability of internet shopping and other SFT. A key pattern across main food spending emerges in Huntingdon (Zone 1 | 4.3%), Ramsey (Zone 5 | 1.0%) and St Neots (Zone 10 | 0.0%) where the proportion of online shopping is lower than the Study Area average and even, in the cases of Ramsey and St Neots, lower than the Experian SFT figures. This would suggest that residents are carrying out more main food shopping in physical stores in these town centres where there is a wider convenience offer and greater provision of national multiple foodstores, whereas in St Ives (which is anchored by a large Waitrose foodstore with little other convenience offer) the proportion of online main food shopping is notably higher (Zone 3 | 15.5%).
- 6.48** Notably, 100% main food internet shopping across the Survey Area was received via a home delivery service, as opposed to 'click and collect' hubs, although this is available at Tesco in both Huntingdon and St Neots or via collection in-store. The vast majority of main food internet spending across the Survey Area was to Tesco (58.5%), followed by Ocado (16.7%) then Asda (11.2%) and Sainsbury's (10.3%).
- 6.49** In terms of comparison spending, as demonstrated in Figure 6.8, Zone 9 showed the highest proportion of online spending, closely followed by Zones 7, 3 and 8, whilst residents of Zones 6, 5, 2b and 10 showed the lowest level on online comparison goods spending. This would suggest a trend of increased online shopping for comparison goods in zones with lower accessibility to the surrounding higher order centres of Peterborough to the north and Cambridge to the southeast. In terms of Huntingdonshire's four market town centres, St Ives (Zone 3) has the highest proportion of online comparisons goods spending (33.6%). Ramsey represents the lowest proportion of SFT spending at 22.1%, suggesting that residents of Ramsey are willing to travel further to a physical comparison goods store. Due to the relative lack of comparison goods facilities across Ramsey, it is likely that residents carry out more

frequent and more concentrated trips to centres with a greater comparison offer and therefore, are less likely to need to supplement these goods with online spending.

- 6.50** Huntingdon's percentage of online spend on recreational goods (Zone 1 | 32.1%) is lower than all other zones in the Study Area and well below the Study Area average (43.2%), reflecting the relatively high proportion of recreational goods stores located in Zone 1. In comparison, St Ives has one of the highest percentages of online spending on recreational goods in the Study Area, with 50.2% of recreational goods in Zone 3 being brought online. Online spend on books and other media goods in Huntingdon (Zone 1 | 76.9%), St Neots, (Zone 10 | 74.9%) and St Ives (Zone 3 | 85.6%) is higher than the District average of 71.2%. This is a particularly high proportion of online spending, and is recognised by the online retailer Amazon, which has awarded Huntingdon the title of the 'most read town in the UK' for five years in a row (2010-2015), based on the number of book sales per head. Huntingdon (Zone 1) and Ramsey (Zone 5) are the only zones where 0.0% of DIY shopping is spent online. This is indicative of the strong draw of DIY stores in Huntingdon Town Centre and the surrounding retail parks in Zone 1 and the presence of the popular Wates store in Ramsey.

Leakage

- 6.51** Notably, in terms of leakage to physical retail stores, Huntingdonshire District is bordered to the north and southeast by Peterborough and Cambridge respectively, as well as Bedford and Milton Keynes to the southwest (although the survey shows that these centres have less of a retail draw on residents of Huntingdonshire District).
- 6.52** 29.7% of convenience goods expenditure in physical stores made by residents of the Study Area is 'lost' from the District, while 55.0% of all comparison goods expenditure in physical stores from residents of the Study Area is spent outside the District. This is referred to as 'Study Area Leakage'.
- 6.53** Whilst the proportion of comparison goods spending to Peterborough and the surrounding retail parks has marginally decreased from 19.1% (2010) to 17.4% (2016), the proportion of leakage to Cambridge (including retail parks) has significantly increased from 13.7% (2010) to 20.3% (2016). This has resulted in the increase in the total leakage of comparison goods spend from 49.6% in 2010 to 55.0% in 2016.
- 6.54** The increased draw of Cambridge to residents of the Study Area over this period can likely be attributed to a number of factors, including the introduction of the Cambridgeshire Guided Busway (connecting Huntingdon and St Ives to Cambridge) in 2011 and the growing appeal of the Grand Arcade shopping centre (opened in 2007 and fully let by 2010), which will have increased its market share in the years following the 2010 Study as new retail developments

will typically take up to 3 years to establish a presence across the region.

- 6.55** Figure 6.9 identifies that Peterborough and Cambridge, including retail parks, each drew 12.2% of the total available expenditure from the Survey Area in 2016, with Bedford accounting for a further 6.0% of all spending.

Figure 6.9 | Study Area Leakage by Destination (%)

Destination	Study Area Leakage by Category (%)												Total Leakage (all retail)
	Convenience Spending			Comparison Spending									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
Peterborough	5.3	2.0	4.7	22.0	15.8	17.8	14.9	6.2	18.2	8.2	17.6	17.4	12.2
Cambridge	0.5	1.3	0.6	31.7	19.9	19.0	18.7	4.2	20.2	4.9	12.2	20.3	12.2
Bedford	3.9	2.2	3.6	10.8	4.5	5.6	9.1	5.2	6.3	3.7	10.2	7.7	6.0
Others outside Huntingdonshire	22.4	14.2	20.8	13.4	10.0	9.0	8.2	10.4	6.6	3.3	11.4	9.6	14.2
Total Leakage from Huntingdonshire	32.0	19.7	29.7	77.9	50.3	51.4	50.8	26.0	51.3	20.1	51.5	55.0	44.6

Source: Appendix D

- 6.56** Convenience leakage was focussed towards Peterborough, which drew 5.3% of all main food trips and 2.0% of all top-up trips (4.7% in total) from residents across the Study Area, while 3.6% of all convenience spending was made at facilities in Bedford.
- 6.57** Combined, Peterborough and Cambridge account for over 50% of Study Area expenditure on clothing goods, and over 30% of all spending on media (such as books and CDs), household goods, recreation goods and electrical goods. It is interesting to note that Peterborough, Cambridge and Bedford draw comparatively little DIY and chemist goods expenditure from the Study Area, where Huntingdonshire shows strong retention rates.
- 6.58** Figure 6.9 shows that nearly 80% of spending on clothing and footwear by residents across the Study Area is spent at retail destinations outside of the Study Area. Likewise, there is seen to be a high degree of leakage of books and CDs (50.3%), household goods (51.4%), toys and recreational goods (50.8%), electrical goods (51.3%) and furniture (51.5%) that is purchased outside of the Study Area.

Summary

- 6.59** Huntingdonshire's market share of convenience goods expenditure to physical stores in the District has dropped from 72.1% in 2010 to 70.3% in 2016, while retained comparison goods expenditure to physical stores has fallen from 50.4% in 2010 to 45.0% in 2016.
- 6.60** We take into account Special Forms of Trading (SFT), including online shopping, utilising SFT growth forecasts over the plan period from Experian and the ONS, which is then adjusted to remove internet sales that are derived from individual stores. Online convenience goods spending was notably lower in Zones with a greater provision of national multiple foodstores, whereas Zones with lower accessibility to a wide variety of facilities showed a higher proportion of online spend. In comparison terms, the proportion of online shopping was lower in zones with greater accessibility to the nearby regional centres, such as Cambridge and Peterborough.
- 6.61** Notably, when including physical town centre, edge and out-of-centre stores, Huntingdon (Zone 1) and St Neots (Zone 10) have seen an increase in convenience market share (or 'claw back') of 19.7% and 21.7% at 2016 from 15.3% and 21.6% in 2010, respectively. This can largely be accounted for by the continued trading success of Sainsbury's at Chequers Court in Huntingdon Town Centre, the out-of-centre Tesco foodstores at Wertheim Way and Abbots Ripton Road (Huntingdon) and Barford Road (St Neots), as well as the out-of-centre Lidl at Stukeley Road in Huntingdon, which has gained a total market share of 4.6% of convenience trade across the Study Area since opening in 2015.
- 6.62** In terms of comparison goods, spending in physical stores in Huntingdon, St Neots and St Ives fell from their 2010 market shares (while Ramsey marginally grew), with residents of almost every zone increasing spending in stores outside of each of the four town centres and outside of the District, suggesting that the comparison retail draw of the District's market town centres has diminished over the past six years in particular, relative to the comparison retail draw of Cambridge.

7.0 Retail Capacity

Introduction

- 7.1** One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the plan period to 2036. The use of long term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External national and international factors can influence the wider performance of the economy, which can have trickle down effects on local shopping patterns. One such example has been the trend toward convenience discounters (such as Lidl and Aldi) in response to the period of economic downturn between 2008 and 2013.
- 7.2** We would also note that any identified retail capacity across the Study Area does not necessarily equate to justification for new retail floorspace in and of itself (especially in out-of-centre locations), and any such development would be required to be assessed in line with national policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the ‘town centre first’ sequential approach to site selection.
- 7.3** Detailed quantitative retail capacity tables are enclosed at **Appendix D**.

Methodology

- 7.4** Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions:

$$\text{Expenditure (£m)} - \text{Turnover (£m)} = \text{Surplus or Deficit (£m)}$$

- 7.5** Experian MMG3 census software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards on the basis of population growth, changes in expenditure over time and Special Forms of Trading (SFT) such as internet shopping.
- 7.6** The turnover of existing retailers across the Study Area is calculated on the basis of average sales densities, or turnover, per square metre. Various retail planning sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or benchmark) sales densities for all national multiple retailers.
- 7.7** The surplus or deficit equates to the difference between the available retail expenditure across the Study Area and the turnover of the existing facilities within the Study Area. If the

total turnover is greater than the available expenditure then the model would identify an oversupply of retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.

- 7.8** Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a 'real world' context. Often surplus figures are presented under a number of different scenarios representing various retailers, For example, considering convenience spend, discount retailers (such as Aldi and Lidl) operate at a lower sales density than the 'big 4' (Tesco, Asda, Sainsbury's and Morrisons).

Strategic Expansion Locations (SEL)

- 7.9** Whilst the population data utilised within the retail capacity model (Cambridgeshire Research Group, February 2015) incorporates the projected population growth associated with the planned SELs at Alconbury Weald, St Neots East and Wyton-on-the-Hill, we have undertaken a standalone exercise to forecast the capacity for new retail floorspace that each projected population could support.
- 7.10** We calculate the population of each strategic expansion location by applying an average of 2.5 people per new dwelling (as per the Cambridgeshire Research Group projections). Taking the convenience and comparison expenditure per capita data for the zones in which the strategic expansion locations are to be located (Experian MMG3), we are able to calculate the total available convenience and comparison goods expenditure generated by the new populations of each of the proposed strategic expansion locations.
- 7.11** The total available expenditure is then applied to suitable sales densities to establish the total amount of convenience and comparison retail (expressed in terms of floorspace) that could be supported by each strategic expansion location, if retention was 100% and residents only shopped within the local retail facilities.
- 7.12** We then go on to apply an assumption that 50% of the convenience expenditure of new residents is spent at the new retail facilities within the strategic expansion location, and that 20% of comparison goods spending is retained by local retail facilities to account for purchases of day to day comparison goods, while higher order goods would be expected to be purchased from larger surrounding town centres.

Figure 7.1 | Estimated 'capacity' for new retail facilities in the proposed SEL

	Alconbury Weald		St Neots East		Wyton-on-the-Hill		
	Convenience	Comparison	Convenience	Comparison	Convenience	Comparison	
Number of New Households Proposed¹	5,000		3,820		4,500		
Household Size² (2036)	2.5		2.5		2.5		
Population (2036)	12,500		9,550		11,250		
Expenditure per Capita³ (2036)	£1,976	£5,491	£1,961	£4,831	£2,084	£5,569	
Additional Expenditure (2036)	£24.7m	£68.6m	£18.7m	£46.1m	£23.4m	£62.7m	
Retention rate⁴	50%	20%	50%	20%	50%	20%	
Residual Expenditure (2036)	£12.4m	£13.7m	£9.4m	£9.2m	£11.7m	£12.5m	
Net Floorspace Capacity (sq m net)	Min^{5,6}	1,000 sq m	1,700 sq m	700 sq m	1,100 sq m	900 sq m	1,500 sq m
	Max^{7,8}	1,200 sq m	2,600 sq m	900 sq m	1,800 sq m	1,100 sq m	2,400 sq m

¹ The number of households proposed sourced from Huntingdonshire District Council's Emerging Local Plan (January 2015)

² Household size sourced from Population Forecasts 2013 Districts and Wards, Cambridgeshire Research Group (February 2015)

³ Expenditure per capita figures sourced from Appendix D, Table 1 (convenience) and Table 7b (comparison)

⁴ Retention rate based on Nexus Planning assumptions

⁵ Average convenience sales density assumed to be £12,502 per sq m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2014

⁶ Average comparison sales density assumed to be £5,500 per sq m which Nexus Planning considers to be towards the higher end of what could be achieved in Huntingdonshire District

⁷ 50% of convenience residual expenditure assumed to be consumed by leading four supermarkets (£13,018/sq m) and 50% assumed to be consumed by discount operators (£7,635 per sq m) as identified by Verdict 2014 and Mintel 2015. This equates to £8,907/sq m.

⁸ Average comparison sales density assumed to be £3,500 per sq m which Nexus Planning considers to be towards the lower end of what could be achieved in Huntingdonshire District.

Source: Tables 27-29, Appendix D

7.13 Notwithstanding the above standalone exercise, we go on to consider the 'global' capacity for new retail floorspace across the District (including the proposed populations of each strategic expansion location) and for each town centre, before making recommendations on the suitable provision of retail floorspace within each strategic expansion location and the proportion of additional retail floorspace that should be directed to supporting the surrounding town centres.

Capacity for Future Convenience Goods Floorspace

7.14 For robustness, when assessing the capacity for new convenience retail floorspace we adopt a constant market share in line with findings of the latest household survey (i.e. that stores across Huntingdonshire District will continue to draw 70.3% of all convenience goods spending across the Study Area) on the basis of the comparable strength of offer of the

surrounding centres.

7.15 In addition to allowing for growth in retail expenditure over the plan period (as considered in Section 5), we utilise data provided within the Experian Retail Planner Briefing Note in order to take account of forecast growth in efficiencies in retailers trading (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting continues to subdue projected efficiencies in turnover of existing convenience retail floorspace.

7.16 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for a number of variables:

- Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores. These assumptions are made in line with floorspace figures sourced from Verdict UK or, where data is not available, Nexus professional judgement based on site visits.
- We also make assumptions as to the gross to net sales floorspace of each store, again utilising online planning records where available, Verdict UK Food & Grocery Retailers 2014 or Nexus professional judgement.
- Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. Based on the localised nature of convenience food shopping and the extent of the Study Area it is unlikely that convenience destinations within Huntingdonshire draw a significant amount of trade from outside of the Study Area.

7.17 We then go on to calculate the anticipated turnover of all major convenience goods operators on the basis of the published company sales data, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from national average 'sales densities' (turnover per square metre) from sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings. By comparing the turnover estimates derived from the findings of the household survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (undertrading) company averages. For stores located outside of designated town centres, surplus expenditure over and above benchmark turnover is considered to be available as this suggests that existing convenience goods providers in the Study Area are stretched and overproviding to meet the existing need.

- 7.18** As smaller convenience retailers and local traders may not publish annual turnover figures and there is not a standardised dataset available, local town centre stores are assumed to be trading in line with the findings of the household survey (at 2016), or ‘at equilibrium’. We provide a detailed assessment of this benchmark exercise measuring the performance of convenience retailers at Table 5, **Appendix D**.
- 7.19** On the basis of the household survey, we identify that convenience retailers within Huntingdonshire turnover an estimated £297.3m, higher than the benchmark turnover of £270.1m at 2016. This overtrade equates to £26.5m of additional expenditure across the Study Area, or 9.8% above company averages. In particular, £16.0m and £19.1m of overtrading is derived from the Lidl at Stukeley Road and the Tesco at Wertheim Way in Huntingdon while the Waitrose at Station Road in St Ives and the Lidl at Cambridge Street in St Neots are identified as overtrading by £13.6m and £6.1m respectively.
- 7.20** Notwithstanding the above, it is also noted that a number of stores across District are trading at below company averages. The Iceland in Huntingdon is undertrading by £3.2m, the Co-op at Newtown Road in Ramsey by £7.9m and in St Neots the Marks and Spencer and the Co-op at Tebbutts Road are undertrading by £5.4m and £2.9m respectively.

Figure 7.2 | Convenience Goods Surplus in Huntingdonshire District

Year	Turnover (£m) ¹	Available Expenditure (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2016	270.1	297.3	0.0	27.2
2021	268.7	319.7	0.0	50.9
2026	268.5	333.1	0.0	64.6
2031	268.5	342.5	0.0	74.0
2036	268.5	346.0	0.0	77.5
Study Area Market Share (%)		70.3		

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 13 (October 2015)

² Assumes constant market share claimed by Huntingdonshire District facilities at 70.3% from Study Area (allows for no inflow)

Source: Table 6a, Appendix D

- 7.21** Tying the methodology together, Figure 7.2 identifies a surplus of £27.2m expenditure in 2016, rising to £50.9m in 2021 taking account of increases in population, expenditure and floorspace efficiencies. Surplus is estimated to grow to £64.6m by 2026, £74.0m by 2031 and £77.5m at 2036.
- 7.22** We then consider committed, emerging and extant permissions for new convenience retail floorspace across the District that could come forward over the next few years. We do not take into account proposed allocations for retail floorspace that do not benefit from extant and implementable permission over the plan period. In total, these committed developments

equate to a net convenience floorspace of 12,081 sq m and an estimated turnover of £116.5m.

Figure 7.3 | Convenience Goods Floorspace Capacity in Huntingdonshire District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	27.2	116.5	-89.2	-6,900	-8,700
2021	50.9	115.9	-64.9	-5,000	-6,300
2026	64.6	115.8	-51.1	-4,000	-5,000
2031	74.0	115.8	-41.8	-3,200	-4,100
2036	77.5	115.8	-38.3	-3,000	-3,700

¹ Average sales density assumed to be £12,502 per sq m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2014

² 50% of residual expenditure assumed to be consumed by leading four supermarkets (£13,018/sq m) and 50% assumed to be consumed by discount operators (£7,635 per sq m) as identified by Verdict 2014 and Mintel 2015. This equates to £8,907/sq m.

Source: Table 6d, Appendix D

7.23 Taking account of committed turnover, we identify a residual turnover of £-89.2m at 2016, rising to £-38.3m at 2036. Using average sales densities to cater for minimum (a large supermarket operator) and maximum (a combination of discount foodstores and larger supermarket operators) scenarios, we calculate that there is no capacity for new convenience retail floorspace, should all of the committed developments come forward as identified in Figure 7.3.

Figure 7.4 | Likely Convenience Goods Floorspace Capacity in Huntingdonshire District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	27.2	51.9	-24.7	-1,900	-2,400
2021	50.9	51.7	-0.7	-100	-100
2026	64.6	51.6	13.0	1,000	1,300
2031	74.0	51.6	22.4	1,700	2,200
2036	77.5	51.6	25.9	2,000	2,500

¹ Average sales density assumed to be £12,502 per sq m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2014

² 50% of residual expenditure assumed to be consumed by leading four supermarkets (£13,018/sq m) and 50% assumed to be consumed by discount operators (£7,635 per sq m) as identified by Verdict 2014 and Mintel 2015. This equates to £8,907/sq m.

Source: Table 6f, Appendix D

7.24 As shown in Figure 7.4, we then go on to consider the 'likely scenario' and the committed retail floorspace that is likely to come forward over the next few years as identified at **Appendix E**. Our assumptions are based on discussions with planning officers, company

statements and from media reports. In producing a 'likely scenario', we disregard the Sainsbury's foodstore allocated as part of the Huntingdon West Area Action Plan and the proposed Morrisons foodstore in St Ives, both of which have been announced as shelved by their respective developers, thereby significantly reducing the convenience turnover of the committed floorspace in 2016 from £116.5m to £51.9m.

- 7.25** Across Huntingdonshire District as a whole, taking account of the turnover of commitments that are likely to come forward over the plan period, we identify a total negative residual turnover of £-24.7m at 2016, rising to £-0.7m at 2021, £13.0m at 2026, £22.4m at 2031 and £25.9m at 2036. On the basis of minimum and maximum average sales densities, we calculate that there is negative capacity for convenience goods floorspace at 2016 and 2021, but that by 2026 there will be capacity for between 1,000 sq m and 1,300 sq m of new convenience goods floorspace, rising to between 1,700 sq m and 2,200 sq m at 2031 and between 2,000 sq m and 2,500 sq m at 2036.
- 7.26** We then go on to consider the location of the convenience floorspace capacity, sub-divided between the District's four market towns on the basis of the available expenditure from the resident population and taking account of the forthcoming strategic expansion locations proposed in the Local Plan to 2036.
- 7.27** Huntingdon Town Centre is intended to serve as the primary retail destination for the proposed strategic expansion location at Alconbury Weald (located in Zone 8), albeit an element of local retail provision will be required to ensure that the allocation develops into a sustainable community, and as such we have incorporated the associated population increases into the projected available expenditure.
- 7.28** The strategic expansion location at Wyton-on-the-Hill (located in Zone 4), which will be partly served by both Huntingdon and St Ives Town Centres (in addition to local retail provision), is taken into account in line with the current market share of Huntingdon Town Centre from residents of Zone 4 (65%).
- 7.29** We go on to incorporate the proposed Wyton-on-the-Hill population when calculating the available convenience goods floorspace capacity of St Ives, on the basis of existing market share patterns (35%).
- 7.30** St Neots Town Centre available expenditure is calculated from the resident population of Zone 10 (St Neots), which includes the increase in population of the Strategic expansion location at St Neots East that will primarily be served by St Neots Town Centre.

Figure 7.5 | Likely Convenience Goods Floorspace Capacity in Huntingdon

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	6.2	35.1	-28.9	-2,200	-2,800
2021	45.8	34.9	10.9	800	1,100
2026	51.1	34.9	16.2	1,300	1,600
2031	54.8	34.9	19.9	1,500	1,900
2036	56.2	34.9	21.3	1,600	2,100

¹ Average sales density assumed to be £12,502 per sq m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2014

² 50% of residual expenditure assumed to be consumed by leading four supermarkets (£13,018/sq m) and 50% assumed to be consumed by discount operators (£7,635 per sq m) as identified by Verdict 2014 and Mintel 2015. This equates to £8,907/sq m.

³ Huntingdon's available expenditure incorporates Zone 1 (Huntingdon) and Zone 8 (West Huntingdon), so as to account for the Strategic expansion location at Alconbury Weald which will look to Huntingdon Town Centre to meet its main retail needs. In addition, 65% of the available expenditure from Zone 4 (North East Huntingdonshire) has been incorporated to account for the increase in population of the Strategic expansion location at Wyton-on-the-Hill, which will be partly served by Huntingdon Town Centre in line with current market shares from Zone 4.

Source: Table 6I, Appendix D

Figure 7.6 | Likely Convenience Goods Floorspace Capacity in St Neots

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	-0.2	15.3	-15.5	-1,200	-1,500
2021	7.2	15.2	-8.0	-600	-800
2026	11.4	15.2	-3.8	-300	-400
2031	14.3	15.2	-0.9	-100	-100
2036	15.4	15.2	0.2	0	0

¹ Average sales density assumed to be £12,502 per sq m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2014

² 50% of residual expenditure assumed to be consumed by leading four supermarkets (£13,018/sq m) and 50% assumed to be consumed by discount operators (£7,635 per sq m) as identified by Verdict 2014 and Mintel 2015. This equates to £8,907/sq m.

³ St Neots' available expenditure incorporates Zone 10 (St Neots) which includes the increase in population of the Strategic expansion location at St Neots East which will be primarily served by St Neots Town Centre.

Source: Table 6Z, Appendix D

Figure 7.7 | Likely Convenience Goods Floorspace Capacity in St Ives

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	13.4	0.0	13.4	1,000	1,300
2021	17.9	0.0	17.9	1,400	1,700
2026	20.5	0.0	20.5	1,600	2,000
2031	22.3	0.0	22.3	1,700	2,200
2036	23.0	0.0	23.0	1,800	2,200

¹ Average sales density assumed to be £12,502 per sq m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2014

² 50% of residual expenditure assumed to be consumed by leading four supermarkets (£13,018/sq m) and 50% assumed to be consumed by discount operators (£7,635 per sq m) as identified by Verdict 2014 and Mintel 2015. This equates to £8,907/sq m.

³ St Ives' available expenditure incorporates Zone 3 (St Ives) and 35% of the available expenditure from Zone 4 (North East Huntingdonshire), so as to account for the increase in population of the Strategic expansion location at Wyton-on-the-Hill which will be partly served by St Ives Town Centre in line with current market shares from Zone 4.

Source: Table 6r, Appendix D

Figure 7.8 | Likely Convenience Goods Floorspace Capacity in Ramsey

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	-19.9	0.0	-19.9	-1,500	-1,900
2021	-18.5	0.0	-18.5	-1,400	-1,800
2026	-17.7	0.0	-17.7	-1,400	-1,700
2031	-17.2	0.0	-17.2	-1,300	-1,700
2036	-17.0	0.0	-17.0	-1,300	-1,700

¹ Average sales density assumed to be £12,502 per sq m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2014

² 50% of residual expenditure assumed to be consumed by leading four supermarkets (£13,018/sq m) and 50% assumed to be consumed by discount operators (£7,635 per sq m) as identified by Verdict 2014 and Mintel 2015. This equates to £8,907/sq m.

Source: Table 6v, Appendix D

- 7.31** Having taken account of the projected turnover of local commitments in **Huntingdon**, we find that the Town Centre and the strategic expansion locations at Alconbury Weald and Wyton-on-the-Hill have an identified residual expenditure of £-28.9m in 2016, which equates to a negative convenience goods floorspace capacity. In line with population, expenditure and retail efficiency growth, this available capacity is projected to rise to between 800 sq m and 1,100 sq m of net convenience goods floorspace in 2021, between 1,300 sq m and 1,600 sq m at 2026, between 1,500 sq m and 1,900 sq m at 2031 and between 1,600 sq m and 2,100 sq m at 2036.
- 7.32** We would suggest that this capacity available over the study period could be met through a small-medium sized foodstore of between 600 and 900 sq m in Huntingdon Town Centre

(having regard to the significant overtrading of out-of-centre stores) in addition to a small to medium sized convenience retailer of 1,000 sq m to 1,200 sq m in Alconbury Weald by 2036, noting that the majority of the new population's convenience shopping is expected to be met by retailers within Huntingdon Town Centre. This is supported by the standalone assessment of the capacity of the Alconbury Weald strategic expansion location at Figure 7.1.

- 7.33** In calculating the available convenience floorspace capacity in **St Neots**, we account for the additional spending from the emerging population of the strategic expansion location at St Neots East, as well as the turnover of the approved Lidl (Great North Road) and Aldi (Howard Road) foodstores in Eaton Socon and the net undertrading (below national company averages) of convenience retailers across St Neots.
- 7.34** Overall, we identified a residual turnover deficit of £-15.5m in 2016 that is forecast to rise to a marginal surplus of just £0.2m by 2036. This equates to a negative convenience goods floorspace capacity from 2016 to 2031, while the projected surplus of £0.2m is not calculated to be sufficient to support any new convenience retail floorspace in St Neots over the plan period.
- 7.35** Whilst we do account for the recently approved Lidl foodstore at Great North Road in Eaton Socon, we would note that the capacity model assumes that the existing town centre Lidl on Cambridge Street will remain trading throughout the study period (or continue under a different foodstore operator). Given that the identified undertrading of convenience stores in St Neots Town Centre suggests an overprovision of convenience floorspace, we would not recommend allocating any new retail floorspace to St Neots Town Centre or to the emerging St Neots East strategic expansion location. However, should the Lidl foodstore on Cambridge Street cease trading as a convenience retailer, we would suggest that the floorspace capacity assessment for St Neots Town Centre is revisited.
- 7.36** **St Ives** Town Centre (incorporating a share of the projected expenditure of new residents of the strategic expansion location at Wyton-on-the-Hill) is calculated to have an available residual expenditure of £13.4m at 2016, rising to £23.0m by 2036. This gives rise to a net available capacity for between 1,000 sq m and 1,300 sq m of convenience goods floorspace at 2016, rising to between 1,400 sq m and 1,700 sq m at 2021, between 1,600 sq m and 2,000 sq m at 2026, between 1,700 sq m and 2,200 sq m at 2031 and between 1,800 sq m and 2,200 sq m at 2036.
- 7.37** Of this net available capacity, given the relative strength of the convenience retail provision in St Ives (and in particular the anchor Waitrose foodstore), we would suggest that St Ives Town Centre would have capacity for a medium sized convenience retailer of between 900

sq m and 1,100 sq m by 2036, with a similar sized foodstore planned for residents of the Wyton-on-the-Hill strategic expansion location who would also look to both Huntingdon and St Ives for their convenience retail shopping.

7.38 Whilst there are no major convenience retail applications projected in **Ramsey**, the significant levels of undertrading of both the Co-op on Newtown Road (which has since announced that it is to close) and the Tesco on Neil Way have resulted in a residual expenditure deficit of £-19.9m in 2016, rising to £-17.0m by 2036. This gives a negative available convenience goods floorspace capacity across the plan period rising from between -1,500 sq m and -1,900 sq m at 2016 to between -1,300 sq m and -1,700 sq m by 2036.

7.39 We have also undertaken an assessment of the capacity for new convenience goods floorspace in other rural and local shopping centres (across Zones 2a, 2b, 6, 7 and 9) across the District on the basis of the market shares identified in the household survey. Taking into account the committed development of a local centre to support the new development of 753 dwellings at Bearcroft Farm, Godmanchester, these other zones show a convenience expenditure deficit of £-4.2m at 2016, rising with growth in sales efficiencies to £-1.6m at 2036, suggesting that there is no capacity for new convenience goods floorspace in these other rural and local shopping centres.

Figure 7.9 | Likely Convenience Goods Floorspace Capacity in other rural and local shopping centres

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	-2.7	1.5	-4.2	-300	-400
2021	-1.4	1.5	-3.0	-200	-300
2026	-0.7	1.5	-2.2	-200	-200
2031	-0.2	1.5	-1.7	-100	-200
2036	0.0	1.5	-1.6	-100	-200

¹ Average sales density assumed to be £12,502 per sq m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2014

² 50% of residual expenditure assumed to be consumed by leading four supermarkets (£13,018/sq m) and 50% assumed to be consumed by discount operators (£7,635 per sq m) as identified by Verdict 2014 and Mintel 2015. This equates to £8,907/sq m.

Source: Table 6ad, Appendix D

Capacity for Future Comparison Goods Floorspace

7.40 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard benchmark sales densities for calculating the

turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that Mintel Retail Rankings do provide published sales densities for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are likely to link multiple comparison goods trips and retailers in close proximity to each other provide a greater draw).

- 7.41** As such, we adopt the approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2016 (which adopts the survey derived turnover) and examine capacity by measuring the growth in available expenditure to 2036.
- 7.42** We also make the assumption that the three larger market centres, being Huntingdon, St Neots and St Ives derive 10% of additional turnover from tourists, commuters and other visitors from outside of the surveyed Study Area. This additional expenditure, or 'inflow', equates to £17.8m of additional turnover, or 2.9% of additional expenditure.

Figure 7.10 | Comparison Goods Surplus in Huntingdonshire District

Year	Turnover (£m) ¹	Available Expenditure (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2016	290.1	272.3	17.8	0.0
2021	319.7	331.4	21.7	33.4
2026	352.6	404.8	26.5	78.7
2031	389.3	494.6	32.4	137.7
2036	429.8	583.6	38.2	192.0
Study Area Market Share (%)		45.0		

¹ Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 13 (October 2015)

² Assumes constant market share claimed by Huntingdonshire District facilities at 45.0% from Study Area

Source: Table 26a, Appendix D

- 7.43** Based on the survey findings, we estimate that comparison goods retailers within Huntingdonshire District turnover £290.1m, or 45.0% of available comparison goods expenditure in the Study Area. We adopt a constant market share, assuming that the performance of comparison retailers within Huntingdonshire continues to be commensurate with its current market share. This equates to a total turnover of £429.8m by 2036.
- 7.44** Taking account of inflow, population and expenditure growth and forecast floorspace efficiencies, we identify a surplus expenditure of £33.4m at 2021, rising to £78.7m by 2026, £137.7m by 2031, and £192.0m at 2036. As with convenience capacity modelling, we have taken account of committed comparison retail goods floorspace which equates to a total of 8,526 sq m, or £58.8m of committed comparison goods turnover.

Figure 7.11 | Comparison Goods Floorspace Capacity in Huntingdonshire District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	0.0	58.8	-58.8	-10,700	-16,800
2021	33.4	64.8	-31.4	-5,200	-8,100
2026	78.7	71.5	7.2	1,100	1,700
2031	137.7	78.9	58.7	8,000	12,500
2036	192.0	87.1	104.8	12,900	20,200

¹ Average sales density assumed to be £5,500 per sq m which Nexus considers to be towards the upper end of what could be achieved in Huntingdonshire District

² Average sales density assumed to be £3,500 per sq m which Nexus considers to be towards the lower end of what could be achieved in Huntingdonshire District

Source: Table 26d, Appendix D

7.45 Figure 7.11 identifies a residual expenditure deficit of £-31.4m at 2021, rising to £7.2m at 2026, £58.7m at 2031, and £104.8 at 2036. We go on to utilise average sales densities for high street retailers (the upper end of what could be achieved) to provide assumed minimum floorspace estimates and average sales densities for bulky goods retailers (the lower end of what could be achieved) to provide assumed maximum comparison goods floorspace capacity estimates. This available residual spend equates to a negative comparison goods floorspace capacity at 2021, rising to an estimated 1,100 sq m and 1,700 sq m at 2026, between 8,000 sq m and 12,500 sq m at 2031 and between 12,900 sq m and 20,200 sq m at 2036.

7.46 We again look at the 'likely scenario' following an assessment on the likelihood of committed developments coming forward over the study period (**Appendix E**), reducing the commitment turnover by 49.5% to £29.7m.

Figure 7.12 | Likely Comparison Goods Floorspace Capacity in Huntingdonshire District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	0.0	29.7	-29.7	-5,400	-8,500
2021	33.4	32.7	0.7	100	200
2026	78.7	36.1	42.6	6,400	10,000
2031	137.7	39.9	97.8	13,300	20,800
2036	192.0	44.0	148.0	18,200	28,500

¹ Average sales density assumed to be £5,500 per sq m which Nexus considers to be towards the upper end of what could be achieved in Huntingdonshire District

² Average sales density assumed to be £3,500 per sq m which Nexus considers to be towards the lower end of what could be achieved in Huntingdonshire District

Source: Table 26f, Appendix D

7.47 Considering only the turnover of the comparison goods retails commitments likely to come

forward over the study period provides a residual expenditure surplus of £0.7m at 2021, rising to £42.6m at 2026, £97.8m at 2031, and £148.0 at 2036. This available expenditure would provide for an estimated comparison goods floorspace capacity of between 100 sq m and 200 sq m in 2021, rising to 6,400 sq m and 10,000 sq m at 2026, between 13,300 sq m and 20,800 sq m at 2031 and between 18,200 sq m and 28,500 sq m at 2036.

7.48 As with the convenience floorspace capacity assessment above, we go on to assess the capacity for net additional comparison goods floorspace across each of the four market towns, taking account of the proposed population of the three emerging strategic expansion locations in the Huntingdonshire Local Plan to 2036 in accordance with their location relative to the nearest town centre and the existing market share shopping patterns.

Figure 7.13 | Likely Comparison Goods Floorspace Capacity in Huntingdon

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2021	18.1	19.8	-1.7	-300	-400
2026	42.6	21.8	20.8	3,100	4,900
2031	74.5	24.1	50.5	6,800	10,700
2036	103.9	26.6	77.4	9,500	14,900

¹ Average sales density assumed to be £5,500 per sq m which Nexus considers to be towards the upper end of what could be achieved in Huntingdonshire District

² Average sales density assumed to be £3,500 per sq m which Nexus considers to be towards the lower end of what could be achieved in Huntingdonshire District

³ Huntingdon's available expenditure incorporates Zone 1 (Huntingdon) and Zone 8 (West Huntingdon), so as to account for the Strategic expansion location at Alconbury Weald which will look to Huntingdon Town Centre to meet its main retail needs. In addition, 75% of the available expenditure from Zone 4 (North East Huntingdonshire) has been incorporated to account for the increase in population of the Strategic expansion location at Wyton-on-the-Hill, which will be partly served by Huntingdon Town Centre in line with current market shares from Zone 4.

Source: Table 26i, Appendix D

Figure 7.14 | Likely Comparison Goods Floorspace Capacity in St Neots

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2021	8.9	11.7	-2.7	-400	-700
2026	21.0	12.9	8.2	1,200	1,900
2031	36.8	14.2	22.6	3,100	4,800
2036	51.3	15.7	35.7	4,400	6,900

¹ Average sales density assumed to be £5,500 per sq m which Nexus considers to be towards the upper end of what could be achieved in Huntingdonshire District

² Average sales density assumed to be £3,500 per sq m which Nexus considers to be towards the lower end of what could be achieved in Huntingdonshire District

³ St Neots' available expenditure incorporates Zone 10 (St Neots) which includes the increase in population of the Strategic expansion location at St Neots East which will be primarily served by St Neots Town Centre.

Source: Table 26z, Appendix D

Figure 7.15 | Likely Comparison Goods Floorspace Capacity in St Ives

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2021	4.9	0.0	4.9	800	1,300
2026	11.6	0.0	11.6	1,700	2,700
2031	20.3	0.0	20.3	2,800	4,300
2036	28.4	0.0	28.4	3,500	5,500

¹ Average sales density assumed to be £5,500 per sq m which Nexus considers to be towards the upper end of what could be achieved in Huntingdonshire District

² Average sales density assumed to be £3,500 per sq m which Nexus considers to be towards the lower end of what could be achieved in Huntingdonshire District

³ St Ives' available expenditure incorporates Zone 3 (St Ives) and 25% of the available expenditure from Zone 4 (North East Huntingdonshire), so as to account for the increase in population of the Strategic expansion location at Wyton-on-the-Hill which will be partly served by St Ives Town Centre in line with current market shares from Zone 4..

Source: Table 26r, Appendix D

Figure 7.16 | Likely Comparison Goods Floorspace Capacity in Ramsey

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2021	0.8	0.0	0.8	100	200
2026	2.0	0.0	2.0	300	500
2031	3.5	0.0	3.5	500	700
2036	4.8	0.0	4.8	600	900

¹ Average sales density assumed to be £5,500 per sq m which Nexus considers to be towards the upper end of what could be achieved in Huntingdonshire District

² Average sales density assumed to be £3,500 per sq m which Nexus considers to be towards the lower end of what could be achieved in Huntingdonshire District

Source: Table 26v, Appendix D

Figure 7.17 | Likely Comparison Goods Floorspace Capacity in other rural and local shopping centres

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2021	0.6	1.3	-0.7	-100	-200
2026	1.4	1.4	0.0	0	0
2031	2.5	1.6	0.9	100	200
2036	3.5	1.7	1.7	200	300

¹ Average sales density assumed to be £5,500 per sq m which Nexus considers to be towards the upper end of what could be achieved in Huntingdonshire District

² Average sales density assumed to be £3,500 per sq m which Nexus considers to be towards the lower end of what could be achieved in Huntingdonshire District

Source: Table 26ad, Appendix D

- 7.49** **Huntingdon** Town Centre and the emerging resident population of the strategic expansion locations at Alconbury Weald and Wyton-on-the-Hill produce a total residual expenditure deficit of £-1.7m in 2021, rising to £77.4m in 2036 (having regard to the likely comparison goods commitments within the zone). This available expenditure would provide an estimated net comparison goods floorspace capacity of between 3,100 sq m and 4,900 sq m by 2026, rising to 6,800 sq m and 10,700 sq m at 2031 and between 9,500 sq m and 14,900 sq m at 2036.
- 7.50** It is suggested that the majority of the identified comparison goods retail floorspace capacity be directed towards Huntingdon Town Centre in order to address the recent decline in the centre's market share since 2010 by providing an increased draw through a wider range and offer of comparison goods and operators. In addition, proposed retail floorspace outside of the town centre would be considered for determination on the basis of potential impact on planned investment in the town centre (amongst other relevant material considerations). Taking account of the local day to day comparison shopping needs of the proposed 5,000 new households at the **Alconbury Weald** strategic expansion location, we would recommend planning for between 1,700 sq m and 2,600 sq m of the capacity for new (net) comparison goods floorspace in line with the exercise at Figure 7.1.
- 7.51** The residual expenditure generated by **St Neots** and the St Neots East strategic expansion locations totals £10.6m in 2026, rising to £41.0m by 2036.
- 7.52** On this basis, we estimate that St Neots would have not have any capacity for new comparison goods floorspace until 2026, where we calculate that there is capacity for between 1,600 sq m and 2,500 sq m at 2026, between 3,600 sq m and 5,600 sq m at 2031 and between 5,000 sq m and 7,900 sq m at 2036 (having regard to the likely turnover of committed retail developments). Of this capacity, as with Huntingdon Town Centre, we would recommend that the majority of new comparison goods floorspace be located within St Neots Town Centre in order to support its role within the retail hierarchy and to avoid local competition. We would recommend directing between 1,100 sq m and 1,800 sq m (net) comparison retail floorspace to the **St Neots East** strategic expansion location by 2036 in order to support the day to day needs of the emerging community whilst continuing to direct the majority of comparison goods spending towards the town centre.
- 7.53** Combined, **St Ives** Town Centre and a proportionate share of the proposed residents of the Wyton-on-the-Hill strategic expansion location is calculated to have an available residual expenditure of £4.9m at 2021, rising to £28.4m by 2036.
- 7.54** This gives rise to a net available capacity for between 800 sq m and 1,300 sq m of

comparison goods floorspace at 2021, rising to between 1,700 sq m and 2,700 sq m at 2026, between 2,800 sq m and 4,300 sq m at 2031 and between 3,500 sq m and 5,500 sq m at 2036.

- 7.55** The 4,500 new dwellings planned within the Wyton-on-the-Hill strategic expansion location will primarily be supported by the retail offer of both Huntingdon and St. Ives town centres. Nonetheless, as with the District's other strategic expansion locations, a degree of local comparison goods floorspace will be required. Whilst Figure 7.1 calculates capacity for between 1,500 sq m and 2,400 sq m (net) comparison floorspace within the allocation, we would recommend planning towards the lower end of the spectrum, in light of the desire to direct comparison spending towards the town centres.
- 7.56** **Ramsey** is shown to have a relatively modest residual expenditure of £0.8m at 2021, which is forecast to grow by just £4m to £4.8m by 2036. This equates to an estimated comparison floorspace capacity of between 100 sq m and 200 sq m at 2021, rising to between 300 sq m and 500 sq m at 2026, between 500 sq m and 700 sq m at 2031 and between 600 sq m and 900 sq m.
- 7.57** As with convenience goods, we have modelled the capacity for new comparison good floorspace across the District's other rural and local shopping centres. Figure 7.17 identifies that Zones 2a, 2b, 6, 7 and 9 produce a surplus expenditure of £0.3m by 2026, rising to £2.3 by 2036. We therefore estimate a capacity for new (net) comparison goods floorspace across the rest of the District of up to 100 sq m at 2026, rising to between 300 sq m and 500 sq m at 2036.

Summary

- 7.58** Under the scenario where only the retail floorspace commitments that are likely to come forward are considered, we identify capacity for the delivery of between 2,000 sq m and 2,500 sq m of net additional convenience floorspace and between 20,000 sq m and 31,400 sq m of net additional comparison floorspace across Huntingdonshire by 2036, on the basis of current market share patterns.
- 7.59** Of this, St Ives and a proportion of the Wyton-on-the-Hill strategic expansion location are estimated to provide for the majority of convenience goods floorspace (between 1,800 sq m and 2,100 sq m by 2036), followed by Huntingdon Town Centre, including Alconbury Weald and (in-part) Wyton-on-the-Hill (between 1,600 sq m and 2,100 sq m by 2036). Given the current surplus of convenience goods retailers across St Neots, the town centre and the St Neots East strategic expansion location do not show any capacity for new retail floorspace over the plan period.

- 7.60** In terms of comparison goods floorspace capacity, Huntingdon is shown to have capacity for between 10,600 sq m and 16,700 sq m by 2036. St Neots has an estimated capacity for between 5,000 sq m and 7,900 sq m by 2036, while St Ives has capacity for between 3,500 sq m and 5,500 sq m over the same period.
- 7.61** Ramsey, as the town centre with the smallest market share, had an estimated comparison goods floorspace capacity of between 600 sq m and 900 sq m and did not show any capacity for additional convenience retail floorspace over the study period.

8.0 Leisure

Introduction

- 8.1** The leisure market has undergone drastic structural changes over the past few years. The economic downturn of 2008 to 2013 significantly changed consumers' spending behaviours. Even though overall spending was down, the popularity of going to the cinema or theatre has steadily increased, as has eating out at restaurants, cafés, or purchasing takeaway meals. Additionally, as the health and fitness world flourishes, the number of fitness centre memberships has steadily increased. ONS reported that in 2006 average weekly spend on 'sports admissions, subscriptions, leisure class fees and equipment hire' was £5.80 and in 2014 it had increased to £6.90. Further commentary on recent and emerging leisure trends is included in Section 2 of this report.
- 8.2** This section of the Retail and Leisure Study provides a concise analysis of current and predicted trends influencing the leisure sector.

Methodology

- 8.3** The results of the NEMS Household Survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure needs. As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) in Huntingdonshire's leisure provision.
- 8.4** The modelling of future commercial leisure needs cannot be based upon the same quantitative model used to estimate retail need (as we have done in Section 7 by estimating future expected expenditure). As an alternative, Nexus considers that a more fitting methodology is to appraise Huntingdonshire's existing provision against recognised sector 'standards' or 'benchmarks'. The completion of this 'benchmarking exercise' allows us to establish deficits and where gaps in the provision of existing facilities may be.
- 8.5** There is a limited collection of uses within the leisure market for which reliable data can be obtained. These include; gyms and leisure centres, cinemas, and ten pin bowling. These uses require proportionally larger properties, and by virtue of their size land parcels/sites may need to be identified through the development plan process and land allocated accordingly.
- 8.6** Public houses, restaurants, clubs, are typically accommodated in smaller units. By nature of their smaller size, the market can generally deliver units of this size unaided by intervention by the development plan process through allocations. Moreover, the fact that some uses benefit from permitted development rights (of which some became permanent in early April

2016), means that the supply of these uses is not specifically managed or controlled by the planning process (i.e. they do not necessitate planning permission).

Existing Huntingdonshire Market Share by Leisure Sector

- 8.7** The NEMS household survey (completed in June 2016) included 18 questions which asked respondents to describe their leisure activities and habits. It is the responses to these questions (Questions 36 to 54), which are pertinent to our understanding of leisure trends and needs in Huntingdonshire. The breakdown of the answers to these questions is set out in full within **Appendix C**.
- 8.8** It is important to acknowledge that residents of neighbouring districts, including: South Cambridgeshire, Central Bedfordshire and Bedford, may visit Huntingdonshire to satisfy some leisure (and shopping) requirements, and residents of Huntingdonshire may similarly visit the adjoining districts for the same reason. In response to this, the Study Area (from which respondents were engaged) encompasses areas further than Huntingdonshire, mainly to the south west and south east. The two zones which are beyond the District boundary are Zones 11 and 12.
- 8.9** In the following sections we summarise and interpret the responses given to the household survey, paying particular attention to distance travelled in order to identify any gaps in provision, as well as general levels of satisfaction with Huntingdonshire's provision of leisure.

Participation in Leisure Activities

- 8.10** In the first instance it is important to have an understanding of the participation rates and general popularity of leisure activities across the Study Area. In Question 36 of the household survey NEMS asked respondents to identify all of the leisure activities they participated in (respondents were allow to identify as many options as they wished).
- 8.11** As evident in Figure 8.1, the most popular leisure activity is to go to a restaurant, which 68.7% of Study Area respondents indicated they do on at least an occasional basis. The second most popular activity is a trip to the cinema, which 50.0% of the respondents to Question 36 identified as an activity they partake in. Following this, 45.4% of respondents participate in visits to pubs / bars, while 36.4% visit theatres and concert halls. Visiting bingo halls (4.5% of respondents) and nightclubs (5.7%) are found to be less popular activities for respondents to partake in.

8.12 Figure 8.1 scrutinises participation rates across all thirteen zones.

Figure 8.1 | Participation in Leisure Activities by Zone (%)

Activity	Average	Zone 1	Zone 2a	Zone 2b	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
Health & Fitness	22.7%	25.1%	16.7%	13.8%	24.5%	15.1%	24.8%	25.7%	15.1%	22.2%	30.5%	21.3%	22.3%	30.5%
Cinema	50.0%	38.7%	51.5%	42.9%	45.4%	44.4%	31.1%	29.8%	56.3%	52.7%	61.3%	70.2%	49.7%	62.1%
Restaurant	68.7%	53.9%	44.1%	79.2%	66.0%	60.4%	53.1%	70.4%	71.3%	73.9%	78.5%	79.4%	77.2%	80.7%
Pubs and Bars	45.4%	31.2%	33.8%	39.9%	45.2%	48.9%	27.8%	48.8%	56.0%	37.8%	50.0%	52.6%	40.8%	60.9%
Nightclub	5.7%	0.8%	0.0%	0.0%	6.5%	8.9%	0.0%	1.0%	16.9%	0.9%	5.8%	6.8%	1.6%	15.6%
Social Club	5.8%	3.9%	0.0%	3.6%	5.0%	1.2%	0.0%	5.3%	13.9%	11.2%	9.6%	6.1%	1.6%	12.4%
Ten Pin Bowling	14.6%	8.8%	5.8%	5.6%	10.8%	9.9%	8.4%	9.6%	21.5%	16.9%	15.2%	31.4%	2.7%	20.2%
Bingo	4.5%	1.9%	2.1%	4.2%	6.5%	1.7%	0.0%	6.3%	5.6%	4.6%	9.0%	8.3%	1.6%	0.9%
Theatre / Concert Hall	36.4%	33.7%	24.3%	32.8%	25.5%	29.3%	26.9%	42.3%	36.8%	45.6%	44.4%	39.5%	41.8%	48.9%
Museum / Art Galleries	25.5%	20.7%	21.4%	26.1%	18.3%	16.4%	14.8%	28.5%	27.0%	39.2%	25.7%	30.6%	26.7%	40.9%
Running / Cycling / Outdoor Activities	26.6%	33.6%	15.9%	18.2%	24.3%	18.6%	18.7%	13.0%	30.1%	32.1%	42.3%	27.5%	20.9%	38.6%
(None Mentioned)	14.0%	18.9%	17.0%	12.9%	11.6%	24.5%	21.2%	11.1%	8.2%	15.5%	5.1%	11.9%	15.1%	9.6%

Source: Question 36 of NEMS Household Survey, Appendix C

Indoor Sports and Health and Fitness

8.13 22.7% of Study Area residents participate in indoor sports and/or health and fitness centre activities. Of those who participate, 70.9% of Study Area residents carry out those activities within the District. Huntingdon is the most popular destination as a whole, attracting 25.1% of all participants, followed by St Ives (14.5%) and St Neots (13.7%).

8.14 Closeness to home is predictably a clear determining factor for all sports, health and fitness trips, with the vast majority of residents preferring to visit their local centre. For example, Huntingdon attracts over 90% of the trips from residents of Zones 1 and 2a, St Ives attracts 94.8% of trips from Zone 3 and Ramsey attracts 83.9% of trips from Zone 5. Residents in St

Neots are the most likely to travel farther afield, with only around half staying in the town for their sports and fitness activities.

Figure 8.2 | Study Area Market Share for Indoor Sports or Health and Fitness by Zone (%)

Zone	Huntingdon (Zone 1)	St Ives (Zone 3)	Ramsey (Zone 5)	St Neots (Zone 10)	Others in District	District Total	Elsewhere outside District	Total
1	97.3	0.0	0.0	0.0	0.0	97.0	2.7	100.0
2a	91.5	0.0	0.0	0.0	8.5	100.0	0.0	100.0
2b	7.3	58.1	0.0	0.0	21.7	87.1	12.9	100.0
3	0.0	94.8	0.0	0.0	5.2	100.0	0.0	100.0
4	34.5	35.6	8.2	0.0	21.7	100.0	0.0	100.0
5	4.2	0.0	83.9	0.0	4.2	92.3	6.7	100.0
6	11.3	0.0	0.0	0.0	3.3	14.6	85.4	100.0
7	41.2	0.0	0.0	0.0	43.3	84.5	15.5	100.0
8	45.4	0.0	0.0	0.0	41.7	87.1	12.9	100.0
9	0.0	2.6	0.0	51.2	14.6	68.4	31.6	100.0
10	0.0	0.0	0.0	56.1	10.6	66.7	23.3	100.0
11	0.0	0.0	0.0	5.0	4.1	9.1	90.9	100.0
12	27.2	9.6	0.0	0.0	0.0	36.8	63.2	100.0
Study Area Average	25.1	14.8	6.5	13.7	10.8	70.9	29.1	100.0

Source: Question 37 of NEMS Household Survey, Appendix C

- 8.15** In terms of specific destinations, the most popular are One Leisure, Huntingdon (which attracts 15.8% of all trips in the Study Area), followed by One Leisure, St Ives (11.5%) and One Leisure, St Neots (6.8%).
- 8.16** It is notable that private health and fitness centres hold a relatively small market share in Huntingdonshire. This is likely to be because of their relative lack of representation. The most popular such facility is the former LA Fitness (now Sports Direct) in Huntingdon (3.9% of all trips).
- 8.17** Of the 29.1% of Study Area residents who leave the area to carry out their sports, health and fitness activities, Peterborough is the most popular destination, though the destinations are widely dispersed.

Cinemas

- 8.18** 50.0% of Study Area residents make cinema trips. There are two large cinemas in the District which together attract a healthy 84.7% of all such trips. These are the Cineworld cinemas at Huntingdon (10 screens) and St Neots (6 screens).
- 8.19** In Zones 1-10 (those within the District boundary), only residents of Zone 6 look predominantly outside the District when undertaking their cinema visits. This is unsurprising as the vast majority of residents within this area live closer to Peterborough, where there is a 13 screen Showcase cinema, than either Huntingdon or St Neots.
- 8.20** Residents in Zones 1-5 and 7-8 turn towards the Cineworld in Huntingdon for the majority of their cinema trips, whilst residents to the south of District, in Zones 9 and 10, look towards the Cineworld in St Neots.

Figure 8.3 | Study Area Market Share for Cinemas by Zone (%)

Zone	Cineworld, Huntingdon	Cineworld, St Neots	Others in District	District Total	Elsewhere outside District	Total
1	86.9	11.1	0.0	98.0	2.0	100.0
2a	90.2	0.0	0.0	90.2	9.8	100.0
2b	76.9	4.2	2.1	83.2	16.8	100.0
3	77.6	0.0	0.0	77.6	22.4	100.0
4	78.6	9.6	0.0	88.2	11.8	100.0
5	89.1	0.0	0.0	89.1	10.9	100.0
6	19.1	7.9	0.0	27.0	63.0	100.0
7	81.1	12.4	0.0	93.5	6.5	100.0
8	95.4	2.1	0.0	97.5	6.5	100.0
9	35.4	62.1	0.0	97.5	2.5	100.0
10	7.2	92.8	0.0	100.0	0.0	100.0
11	9.5	37.7	0.0	47.2	52.8	100.0
12	60.4	2.2	0.0	62.6	27.4	100.0
Study Area Average	53.5	31.2	0.1	84.8	15.2	100.0

Source: Question 39 of NEMS Household Survey, Appendix C

Restaurants

- 8.21** 68.7% of Study Area residents make restaurant trips. As Figure 8.4 illustrates, 57.2% of those trips are made to restaurants within the District. St Neots is the most popular destination (attracting 19.1% of all trips), closely followed by Huntingdon (17.9%).
- 8.22** Looking at individual Zones, it is clear that St Neots is very popular with its own residents (79.4% eat locally), whilst residents across the rest of the District spread their trips around the District, as well as farther afield.
- 8.23** Of the 42.8% of trips which are made to destinations outside the District, the most popular locations are Cambridge (15.0% of trips), Peterborough (7.3%) and Bedford (3.8%).

Figure 8.4 | Study Area Market Share for Restaurants by Zone (%)

Zone	Huntingdon (Zone 1)	St Ives (Zone 3)	Ramsey (Zone 5)	St Neots (Zone 10)	Others in District	District Total	Elsewhere outside District	Total
1	53.1	4.6	0.0	1.2	6.6	65.5	34.5	100.0
2a	59.6	7.7	0.0	0.0	21.9	89.2	10.8	100.0
2b	13.8	23.9	0.0	1.2	8.8	47.7	52.3	100.0
3	11.4	46.2	0.0	0.0	3.2	60.8	39.2	100.0
4	32.7	22.1	0.0	0.0	8.1	62.9	37.1	100.0
5	22.2	2.8	41.6	0.0	2.8	69.4	30.6	100.0
6	0.0	1.4	0.0	0.0	17.8	19.2	80.8	100.0
7	21.7	2.1	0.0	3.1	23.9	50.8	49.2	100.0
8	40.1	0.0	0.0	1.6	22.9	64.6	35.4	100.0
9	13.5	0.0	0.0	40.0	17.2	70.7	29.3	100.0
10	1.0	0.0	0.0	79.4	1.4	81.8	19.2	100.0
11	1.5	0.0	0.0	15.7	1.5	18.7	81.3	100.0
12	14.4	11.2	0.0	0.0	0.0	25.6	74.4	100.0
Study Area Average	17.9	9.3	2.1	19.1	8.8	57.2	42.8	100.0

Source: Question 41 of NEMS Household Survey, Appendix C

Bars and Pubs

- 8.24** 45.4% of Study Area respondents regularly visit pubs and bars. Naturally, the vast majority of these trips are carried out close to home, with a large percentage of respondents in each Zone choosing to visit their local town or village. Of the larger towns, St Neots is by far the most popular for bar and pub trips (attracting 29.1% of all trips), followed by St Ives (12.3%) and Huntingdon (9.3%). The District as a whole retains 71.9% of all trips.
- 8.25** Smaller centres, such as Godmanchester (58.3% of Zone 2a trips), Yaxley (26.5% of Zone 6) and Brampton (34.8% of Zone 8) also show up highly in terms of visitation rates.
- 8.26** The largest leakages from areas within the District are observed from Zones 4 and 6, where residents also face eastwards towards Cambridge for their evenings out. Ramsey holds its own in terms of Zone 5 retention (67.7% of trips).

Figure 8.5 | Study Area Market Share for Bars and Pubs by Zone (%)

Zone	Huntingdon (Zone 1)	St Ives (Zone 3)	Ramsey (Zone 5)	St Neots (Zone 10)	Others in District	District Total	Elsewhere outside District	Total
1	83.4	2.0	0.0	0.0	8.2	91.6	8.4	100.0
2a	14.3	0.0	0.0	0.0	63.1	77.4	22.6	100.0
2b	6.1	23.5	0.0	0.0	47.2	76.8	23.2	100.0
3	1.6	71.4	0.0	0.0	1.3	74.3	25.7	100.0
4	3.5	19.3	0.0	0.0	34.4	57.2	42.8	100.0
5	3.9	14.2	67.7	0.0	3.2	89.0	11.0	100.0
6	0.0	0.0	0.0	0.0	39.2	39.2	60.8	100.0
7	1.2	0.0	0.0	0.0	71.8	73.0	27.0	100.0
8	17.5	0.0	0.0	0.0	58.3	75.8	24.2	100.0
9	2.9	1.7	0.0	35.9	40.1	80.6	19.4	100.0
10	0.0	0.0	0.0	90.3	0.0	90.3	9.7	100.0
11	0.0	0.0	0.0	0.0	12.2	12.2	87.8	100.0
12	2.3	6.1	0.0	0.0	2.8	11.2	88.8	100.0
Study Area Average	9.3	12.3	2.4	18.8	29.1	71.9	28.1	100.0

Source: Question 43 of NEMS Household Survey, Appendix C

Ten Pin Bowling

- 8.27** Only 14.0% of Study Area residents play ten pin bowling. Of those that do, more than half (52.7%) visit the Eat N' Bowl facility in St Neots. A further 14.5% visit the One Leisure Centre in St Ives.
- 8.28** Of the 30.6% of residents who play ten pin bowling outside the District, the majority visit either Tenpin in Cambridge, or the AMF Bowling or Lakeside Superbowl facilities in Peterborough.
- 8.29** Figure 8.6 illustrates the results.

Figure 8.6 | Study Area Market Share for Ten Pin Bowling by Zone (%)

Zone	One Leisure Centre, St Ives	Eat N' Bowl, St Neots	Others in District	District Total	Elsewhere outside District	Total
1	33.2	58.1	0.0	91.3	8.7	100.0
2a	0.0	53.6	0.0	53.6	46.4	100.0
2b	55.6	16.2	0.0	71.8	28.2	100.0
3	100.0	0.0	0.0	100.0	0.0	100.0
4	65.5	10.7	23.8	100.0	0.0	100.0
5	0.0	15.1	15.1	30.2	69.8	100.0
6	0.0	0.0	0.0	0.0	100.0	100.0
7	0.0	39.6	5.4	45.0	55.0	100.0
8	29.9	60.9	0.0	90.8	9.2	100.0
9	0.0	82.5	0.0	82.5	17.5	100.0
10	0.0	89.3	0.0	89.3	10.7	100.0
11	0.0	100.0	0.0	100.0	0.0	100.0
12	13.3	0.0	0.0	13.3	86.7	100.0
Study Area Average	14.5	52.7	2.2	69.4	30.6	100.0

Source: Question 45 of NEMS Household Survey, Appendix C

Bingo

- 8.30** Only 4.5% of Study Area residents partake in playing bingo. There are no bingo hall chains present in Huntingdonshire which results in just 11.1% of those trips which are made, being carried out within the District. Of the 88.9% of trips which are carried out elsewhere, the largest numbers of trips are made to Mecca Bingo in Rushden (33.1%).
- 8.31** The zonal breakdown of the survey results is set out in Figure 8.7. Of note, no-one in surveyed in Zones 1 or 5 participated in bingo.

Figure 8.7 | Study Area Market Share for Bingo by Zone (%)

Zone	Zone 1	Zone 3	Zone 9	District Total	Elsewhere outside District	Total
1	0.0	0.0	0.0	0.0	0.0	0.0
2a	100.0	0.0	0.0	100.0	0.0	100.0
2b	0.0	73.9	0.0	73.9	26.1	100.0
3	0.0	17.8	0.0	17.8	82.2	100.0
4	0.0	50.0	0.0	50.0	50.0	100.0
5	0.0	0.0	0.0	0.0	0.0	0.0
6	0.0	0.0	0.0	0.0	100.0	100.0
7	0.0	0.0	0.0	0.0	100.0	100.0
8	0.0	0.0	0.0	0.0	100.0	100.0
9	0.0	0.0	8.5	8.5	91.5	100.0
10	0.0	0.0	26.1	26.1	73.9	100.0
11	0.0	0.0	100.0	100.0	0.0	100.0
12	0.0	100.0	0.0	100.0	0.0	100.0
Study Area Average	0.7	9.1	1.4	11.1	88.9	100.0

Source: Question 47 of NEMS Household Survey, Appendix C

Theatres, Galleries and Museums

- 8.32** Perhaps unsurprisingly, only 5.2% of theatre, gallery and museum trips made by residents of the Study Area are carried out in the District. Local attractions which do retain an element of overall trips as local museums which include The Cromwell Museum in Huntingdon, the Norris Museum in St Ives and the St Neots Museum in St Neots.
- 8.33** Of the 94.8% of trips which are carried out outside the District, major trip attractors include London (41.7% of trips), Cambridge (26.9%) and Milton Keynes (6.6%).

Figure 8.8 | Study Area Market Share for 'Theatres, Galleries and Museums' by Zone (%)

Zone	Huntingdon (Zone 1)	St Ives (Zone 3)	Ramsey (Zone 5)	St Neots (Zone 10)	Others in District	District Total	Elsewhere outside District	Total
1	15.2	0.0	0.0	0.0	0.0	15.2	84.8	100.0
2a	0.0	0.0	0.0	0.0	2.7	2.7	97.3	100.0
2b	2.7	0.0	0.0	0.0	0.0	2.7	97.3	100.0
3	0.0	18.5	0.0	0.0	0.0	18.5	81.5	100.0
4	4.6	2.8	0.0	0.0	2.8	10.2	89.8	100.0
5	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0
6	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0
7	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0
8	0.0	0.0	0.0	2.3	0.0	2.3	97.7	100.0
9	0.0	0.0	0.0	7.5	0.0	7.5	92.5	100.0
10	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0
11	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0
12	0.0	1.8	0.0	0.0	0.0	1.8	98.2	100.0
Study Area Average	2.2	1.8	0.0	0.8	0.4	5.2	94.8	100.0

Source: Question 49 of NEMS Household Survey, Appendix C

Running, Cycling and Outdoor Activities

8.34 18.7% of Study Area residents take part in outdoor sports such as 5-a-side football, while 26.6% of residents participate in outdoor exercise activities, with the vast majority of trips carried out close to home. The plentiful rural areas in the District prove to be popular, with 24.5% of residents who participate in outdoor activities visiting locations outside the main urban areas and likely to include destinations such as Grafham Water, Hinchingsbrooke Country Park and Holme Fen to undertake their outdoor pursuits.

Figure 8.9 | Study Area Market Share for 'Running, Cycling & Outdoor Activities' by Zone (%)

Zone	Huntingdon (Zone 1)	St Ives (Zone 3)	Ramsey (Zone 5)	St Neots (Zone 10)	Others in District	District Total	Elsewhere outside District	Total
1	93.0	0.0	0.0	0.0	4.7	97.7	2.3	100.0
2a	26.9	4.9	0.0	0.0	68.2	100.0	0.0	100.0
2b	10.9	41.9	0.0	0.0	41.2	94.0	6.0	100.0
3	2.9	79.1	0.0	0.0	0.0	82.0	18.0	100.0
4	46.2	9.3	0.0	0.0	31.5	87.0	13.0	100.0
5	0.0	0.0	75.0	0.0	0.0	75.0	15.0	100.0
6	13.6	0.0	0.0	0.0	45.9	59.5	40.5	100.0
7	2.9	0.0	0.0	0.0	76.4	79.3	20.7	100.0
8	26.3	0.0	0.0	0.0	60.1	86.4	13.6	100.0
9	13.5	0.0	0.0	23.6	60.8	97.9	2.1	100.0
10	0.0	0.0	0.0	79.2	2.9	82.1	17.9	100.0
11	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0
12	0.0	2.2	0.0	0.0	0.0	2.2	97.8	100.0
Study Area Average	22.8	9.7	2.8	15.4	24.5	75.2	24.8	100.0

Source: Question 51 of NEMS Household Survey, Appendix C

Additional Leisure Facilities

8.35 Question 54 of the Household Survey found that the significant majority of respondents in Huntingdonshire District (71.2%) did not identify any leisure facilities that they wished to see more of. Of the 71.2%, 63.9% of respondents stated that there were not any they wished to identify, and the remaining 7.3% stated that they 'did not know' what additional facilities could be provided.

8.36 Of the leisure facilities identified, a swimming pool was the most popular response from residents (8.0%). Following this, 3.7% identified more children's facilities and 2.7% more

sports facilities.

8.37 Generally though, the picture for Huntingdonshire was one of broad satisfaction with the level of leisure facilities provided. There are no significant geographic gaps, even when looking at things on a zone by zone basis. However, it was notable that a swimming pool was requested by 12.9% of respondents in Zone 7 and 12.4% of respondents of Zone 6, to the north and west of the District, and that 10.4% of residents in Zone 5 (Ramsey) requested better bar/pub facilities.

8.38 The NEMS Household Survey Results are summarised in Figure 8.10.

Figure 8.10 | Leisure Facilities Which Huntingdonshire Respondents Wish to See More of (%)

Activity	Average	Zone 1	Zone 2a	Zone 2b	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12
None	63.9	62.3	58.4	79.6	74.2	57.8	46.8	57.1	55.1	65.8	60.1	77.3	65.4	60.3
Swimming Pool	8.0	10.5	5.4	2.7	3.8	7.5	2.1	12.4	12.9	9.4	8.1	5.6	2.0	18.1
Don't know	7.3	3.9	6.1	0.9	8.4	3.1	16.0	11.6	1.8	2.5	5.3	8.5	14.0	11.6
Children's Facilities	3.7	8.3	7.6	4.0	1.3	1.2	3.4	3.0	2.3	4.2	8.7	3.1	2.7	0.0
Sports Facilities	2.7	4.7	6.6	1.8	0.8	7.4	3.1	2.7	2.0	2.0	1.7	0.0	1.6	2.7
Outdoor Play Areas	2.2	2.2	9.7	4.0	0.0	0.9	1.0	0.0	7.7	0.0	3.4	1.5	5.9	0.0
Others	12.2	8.1	6.2	7.0	11.5	22.1	27.6	13.2	18.2	16.1	12.7	4.0	8.4	7.3

Source: Question 54 of NEMS Household Survey, Appendix C

Capacity for Additional Leisure Facilities

8.39 Due to the nature of the leisure market we have chosen to adopt a different assessment methodology from that used to analyse the quantitative capacity in the retail market. The motives for this departure primarily relate to the degree to which the leisure market is disaggregated. However, the lack of reliable data for a number of leisure uses (public houses, clubs etc.) has also influenced this decision; as the data available is not sufficient and would not represent credible information from which we can base our assessment.

8.40 As explained earlier the findings of the NEMS Household Survey permit an assessment of the market share secured by facilities within the District and the wider Study Area for a variety of leisure sectors. In order to supplement this qualitative assessment of the attractiveness of the Study Area's facilities, Nexus have drawn on national data.

8.41 As such, we have completed a ‘benchmarking’ exercise by referencing the estimated increases in the Study Area population. The results of the ‘benchmarking’ exercise have been used to inform our conclusions with regards to the prospective future need for additional commercial leisure facilities in Huntingdonshire.

Estimated Study Area Population

8.42 Within Section 5 of this Retail and Leisure Study we set out our assessment of how the Study Area’s population will grow at regular year intervals from 2016 to 2036 (i.e. at 2016, 2021, 2026, 2032 and 2036). We have calculated the population within each postal code sector using Experian Micromarketer G3 data and projected forwards using Cambridgeshire County Council population forecasts.

8.43 Figure 8.11 sets out in full our population forecast for the reporting periods to 2036.

Figure 8.11 | Study Area Population by Survey Zone (2016 to 2036)

Zone	2016	2021	2026	2032	2036
1	24,260	24,200	27,510	27,140	28,450
2a	6,830	6,810	8,500	8,430	8,600
2b	9,850	10,020	10,460	10,550	10,330
3	23,560	23,360	24,050	23,600	24,140
4	16,120	15,930	17,360	22,920	24,450
5	8,760	8,720	9,120	9,040	9,070
6	17,200	16,980	16,870	16,440	15,880
7	10,010	10,300	10,540	10,470	10,190
8	11,330	11,960	16,160	23,040	23,080
9	15,040	15,320	15,340	15,360	14,940
10	32,860	34,100	37,990	41,270	40,990
District Total	175,820	177,700	193,900	208,260	210,120
11	10,517	10,983	11,438	11,840	12,169
12	15,883	16,863	17,738	18,406	19,043
Study Area Total	202,220	205,546	223,076	238,506	241,332

Source: Table 1, Appendix C

8.44 The outcomes of our estimation exercise suggest that by 2016 the zones within the Study Area will have a resident population of approximately 202,220 people and by 2036 this population will grow to 241,332. The estimated 2032 population represents an increase of 19.3%, or 39,112 additional residents.

8.45 Looking solely at the District (broadly, Zones 1 to 10), the current population is estimated to

be 175,820, increasing by 19.5% to 210,120 by 2036.

Health and Fitness

- 8.46** A February 2015 report from Savills⁶⁶ identified that the level of health and fitness clubs in the UK is higher than it has ever been before, with more clubs and more members. In terms of membership rates across the whole of the UK, Savills estimate that 13.2% of the UK's population are registered members of private health and fitness clubs. In 2014 the membership rate was 12.6%. As at February 2015 Savills estimates that there were 6,112 fitness facilities in the UK.
- 8.47** Similarly, the Leisure Database Company's most up to date research (of June 2015)⁶⁷ suggests that there were in the region of 6,312 health and fitness clubs operating across the UK at 2015. We have taken an average of these two estimations, which gives a figure of 6,212.
- 8.48** At the time these estimations were produced the UK population was projected at 65.1 million⁶⁸, and therefore, we calculate there to be on average one club for every 10,480 persons. Our calculations are summarised in Figure 8.12.
- 8.49** When estimating the potential requirement for additional health and fitness facilities in Huntingdonshire, we have considered only the capacity within the District itself (Zones 1 to 10), rather than the wider Study Area (Zones 11 to 12). The reason for this is because the average person is likely to seek out and attend such facilities that are close to home (i.e. typical customer behaviour). Moreover, such trips are likely to be completed by a single person on a regular basis - i.e. several times per week. The type and frequency of trips varies greatly to cinema or ten pin bowling activities. Visits to these kinds of leisure facilities are more often than not completed on a much less frequent basis and undertaken by groups of people and/or families. In consequence to the purpose of visit and frequency participants in cinema or ten pin bowling activities are more willing to travel further distances.
- 8.50** Accordingly, the ten zones which broadly comprise the Huntingdonshire District have an identified estimated population of 175,820 at 2016, increasing to 210,120 at 2036. Based on the assumed benchmark identified above, we calculate that the District could support around 17 health and fitness clubs at 2016, increasing to around 21 clubs at 2036.
- 8.51** There are a total of five publically owned and operated leisure centre complexes in the

⁶⁶ 'The UK's health and fitness sector', Savills online, 27 February 2016

⁶⁷ State of the UK Fitness Industry 2015, Leisure Database Company, June 2015

⁶⁸ As identified by the Office for National Statistics' UK Population mid-year estimate 23 June 2016 data release

District operated as 'One Leisure' – these are in Huntingdon. Ramsey, Sawtry, St Ives and St Neots. The research completed by Nexus has also identified eleven private health and fitness clubs in the District. These are of varying sizes, though most are at the smaller end of the scale, with only the Sports Direct Fitness in Huntingdon being operated by a recognised national chain. This brings the total health and fitness centre provision to 16 in the District. It is also important to note that there may be a limited number of smaller clubs which have not been identified as part of our assessment.

Figure 8.12 | Health and Fitness Centre Requirement in the District

Year	Huntingdonshire Population (Zones 1-10)	Typical Population Required to Support Centre	Potential No. of Clubs Supported by Study Area
2016	175,820	10,480	17
2021	177,700	10,480	17
2026	193,900	10,480	19
2031	208,260	10,480	20
2036	210,120	10,480	21

Note: Typical population to support a health and fitness club derived from the Leisure Database Company research (2015)

8.52 Taking account of the fact the assessment considers more mainstream facilities with larger memberships; it would appear that the current provision of 16 is sufficient for meeting likely demand (estimated at 17 clubs). Notwithstanding this, our appraisal has made it evident that there is a very small representation of national multiple private gyms within the District, with only one present. It should therefore be recognised that there may be an underlying qualitative need for additional facilities of this nature and scale. Of note, recent trends, as identified by both Mintel and Savills, in health and fitness indicate a rise in the popularity of budget private gyms^{69,70}.

8.53 We have identified there to be modest capacity for additional facilities in the period to 2036. This conclusion is based upon current rates of participation in the Study Area (22.7% of respondents to Question 36 of the survey). It is envisaged that the market will likely be able to facilitate the development of such facilities in appropriate locations through the development management process. To summarise, there is no specific need for identified site allocations to provide for these facilities.

⁶⁹ 'Health and Fitness Clubs – UK', Mintel, July 2015

⁷⁰ 'The UK's health and fitness sector', Savills online, 27 February 2016

Cinema

- 8.54** The District has two existing cinemas – Cineworld in Huntingdon (10 screens) and St Neots (6 screens) – which together attract almost 85% of all cinema trips made by residents of the Study Area.
- 8.55** In the year 2015, data kept by the British Film Institute specified a total of approximately 171.9 million cinema admissions in the UK in 2015 – the third highest annual admission count for the past decade⁷¹. Taking account of this spike in admissions, we have looked back at the data kept by the British Film Institute since 2006 to produce an average. This calculation delivers an average of 166.5 million cinema admission per year. In order to estimate the average number of admissions per year we have taken the approximate UK population in 2015 of 65.1 million⁷², and generated a figure which suggests there were on average 2.6 admissions per person per year over the last decade.
- 8.56** The UK Cinema Association specifies that in 2015 there were a total of 4,115 cinema screens throughout the UK⁷³. Again, we have looked back at the past ten years of data held by the UK Cinema Association in order to produce a ten year average. The production of an average allows us to produce a figure which may, in reality, better represent the ‘right’ number of screens to meet market demand. Our calculations results in an average figure of 3,790 screens.
- 8.57** Taking into account the estimations provided by both the British Film Institute and the UK Cinema Association, it is suggested that on average each cinema screen demands 43,931 admissions per year.
- 8.58** Through the application of our benchmarking exercise we have produced an estimate that from the District’s 2016 population (175,820) there would be on average 457,132 cinema admissions in the year 2016, and that by 2036 this would increase to around 546,312 admissions. Following this, we have taken the assumed number of visits per screen and produced a finding that around 12 screens could be supported over the period to 2036. Figure 8.13 sets out our findings.
- 8.59** This exercise suggests that the existing provision of 16 full-time screens within the District is ample to support the District population, and that the growth in population to 2036 will provide welcome additional patronage to the existing cinemas without resulting in any significant demand for new screens. We would not recommend providing for any further

⁷¹ ‘The Box Office 2015 - BFI Research and Statistics’, British Film Institute, April 2016

⁷² As identified by the Office for National Statistics’ 2015-Based National Population Projections 23 June 2016 data release

⁷³ ‘UK cinema industry infrastructure’, UK Cinema Association, Retrieved online in April 2016

cinemas on this basis.

Figure 8.13 | Cinema Screen Requirement in the District

Year	Huntingdonshire Population (Zones 1-10)	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported by the District
2016	175,820	2.6	457,132	43,931	10
2021	177,700	2.6	462,020	43,931	11
2026	193,900	2.6	504,140	43,931	11
2031	208,260	2.6	541,476	43,931	12
2036	210,120	2.6	546,312	43,931	12

Note: Number of cinema trips per person and number of admission per screen derived from BFI and UK Cinema Association data.

Ten Pin Bowling

- 8.60** Mintel is a global and award-winning provider of Market Research, who provides information on trends and insight in the leisure sector. In terms of data on ten pin bowling trends in the UK they are one of the only providers. As such we have looked to Mintel research to provide a general indication of the average number of ten pin bowling lanes per resident in the UK.
- 8.61** In 2011 Mintel identified a total of 5,773 bowling lanes throughout the UK⁷⁴. Taking into account the UK population at the time this data was produced (63.3 million) and assessing this against the 2011 provision of ten pin bowling lanes; results in a figure of one bowling lane per every 10,965 persons. The analysis completed by Nexus is included in Figure 8.14.
- 8.62** There are currently two ten-pin bowling facilities in Huntingdonshire comprising 21 lanes in total; the One Leisure Centre in St Ives (5 lanes) and the Eat N' Bowl in St Neots (16 lanes) and an additional facility at RAF Alconbury with very limited access by the general population.
- 8.63** Figure 8.14 indicates that, based on the assumed benchmark, we calculate that around 20 lanes could be supported in the District in the period up to 2036. This is aligned to the current level of provision.
- 8.64** It is generally accepted that ten pin bowling patronage in the main is reducing. Therefore, it seems likely that the existing level of provision is enough to cater for demands to the end of the Plan period.

⁷⁴ 'Tenpin Bowling – UK', Mintel, November 2011

Figure 8.14 | Ten Pin Bowling Requirement in the District

Year	Huntingdonshire Population (Zones 1-10)	Typical Population Required to Support One Ten Pin Bowling Lane	Potential Number of Lanes Supported by Huntingdonshire District Area
2016	175,820	10,965	16
2021	177,700	10,965	16
2026	193,900	10,965	18
2031	208,260	10,965	19
2036	210,120	10,695	20

Note: Typical number of persons required to support a bowling lane derived from Mintel research

Summary

- 8.65** As part of this Retail and Leisure Study, Nexus has measured Huntingdonshire's existing leisure provision against 'benchmarks' in order to ascertain whether there are any gaps in the market where demand is not being met by existing provision.
- 8.66** In terms of existing market shares, the District provides well for its population in terms of health and fitness, indoor sports, cinemas, ten pin bowling and bars/pubs. Moreover, there is no identified latent capacity for any of the activities that we have been readily able to forecast into the future; health and fitness clubs, cinema screens or ten-pin bowling lanes.
- 8.67** Judging though by the responses to Question 41 of the Household Survey, where the District retains only around 57% of all restaurant trips made by its residents, there is perhaps some justification to seek over the Plan period to diversify the quantity and quality of local provision. Whilst it is inevitable that there will always be an element of leakage from the District, particularly with the relative proximity of both London and Cambridge, we would nevertheless expect to see retention rates higher than 57% based on experience elsewhere.
- 8.68** Turning to consider the requests for new facilities in the District (Question 54 of the household survey); there were no substantial numbers in any one category, with 71.2% of respondents unable to identify any particular need. In our experience, this is a high proportion, and suggests that the District provides well for its residents. A new swimming pool was the most popular request (8.0% of residents). In light of our findings, we do not think that it is necessary for the Council to plan for any significant new major leisure facilities over the Plan period by way of specific site allocations.

9.0 Recommendations and Future Retail Strategy

9.1 This Retail and Commercial Leisure Needs Assessment has been instructed in order to form the evidence base to support the emerging Huntingdonshire Local Plan (up to 2036) in accordance with national policy requirements.

9.2 Specifically, Paragraph 23 of the NPPF indicates that local planning authorities should:

- 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; and
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.

9.3 In addition, Paragraph 26 of the NPPF indicates that local planning authorities may set their

own local threshold for retail, leisure and office developments outside of town centres for which an impact assessment would be required.

- 9.4 The national policy position has informed the Study and the requirements, where relevant, are considered in relation to Huntingdonshire District below.

Summary

District Wide Market Share

- 9.5 Huntingdonshire District's role across the wider region is strongly influenced by the large urban centres of Cambridge to the southeast and Peterborough to the north, as well as Bedford and, to a lesser extent, Milton Keynes to the southwest. In 2016, Cambridge and Peterborough (including retail parks) accounted for 20.3% and 17.4% of all retail expenditure from the Survey Area, reflecting the continued draw of these larger centres to the residents of Huntingdonshire District and the surrounding hinterland.
- 9.6 Retail facilities across Huntingdonshire provide for 55.4% of all retail spending in physical stores across the Study Area (at 2016), a marginal decrease from 58.7% in 2010. This is particularly reflective of the increased draw of the retail offer in Cambridge over this period.
- 9.7 Retailers in Huntingdonshire retained a market share of 70.3% of available convenience goods expenditure from across the Study Area in 2016, a marginal decrease from 72.1% at the time of the previous survey in 2010. A total of 45.0% of all comparison expenditure is presently retained across the Study Area, falling from 50.4% in 2010.

Town Market Share

- 9.8 **Huntingdon** has a convenience goods market share of 20% (50% of which was to central retailers, while 50% was to non-central stores). The Tesco Extra at Abbots Ripton Road has a market share of 10.2% of all convenience spend across the Study Area, equivalent to the market share of all convenience facilities in Huntingdon Town Centre, illustrating the trend (evident across the District) towards residents carrying out more convenience shopping in edge-of-centre and out-of-centre stores.
- 9.9 Huntingdon has a comparison goods market share of 23% (where 60% was made to central retailers and 40% was made to non-central locations) a significant fall from 28% in 2010, with a greater proportion of residents choosing to travel further afield to Cambridge to carry out comparison goods shopping.
- 9.10 Huntingdon was listed as the District's highest rated centre in the 2014-2015 Javelin

Venuescore rankings due, in part, to the high proportion of national multiple retailers (defined as retailers with 9 or more stores nationwide). The pending Chequers Court retail development with Next and Marks and Spencer confirmed as tenants is likely to ensure that this position is maintained for the foreseeable future. Huntingdon has a higher proportion of both convenience and comparison goods floorspace than the national average. Huntingdon also has a lower vacancy rate (the lowest across the District) than the UK average, reflecting its position as the most popular shopping destination within Huntingdonshire.

- 9.11 St Neots** drew 22% of convenience goods expenditure across the Study Area (33% of which was to central stores, while 67% was to non-central stores) and 12% of comparison goods expenditure (83% to central retailers, while 17 % was to non-central stores). Since 2010, there has been a marginal increase of 0.1% to St Neots' convenience market share and a relatively small decrease of 0.7% in the comparison market share.
- 9.12** Our healthcheck assessment of St Neots identified that the centre provides a greater proportion of convenience goods floorspace than the national average, reflecting a significant town centre convenience goods offer provided by Waitrose, Marks and Spencer, Co-op and Lidl. Despite showing a lower proportion of service facilities than the UK average, St Neots has a vibrant night time economy, largely as a result of the 2014 development of the Cineworld cinema and associated restaurants in addition to a number of independent restaurants and cafes. St Neots also demonstrated a lower vacancy rate, and a higher provision of comparison goods retailers, than the national average.
- 9.13** Whilst **St Ives** has the largest number of retail units, it is the second smallest centre in terms of floorspace. This reflects a high presence of small units, constrained by the floorplates of the existing buildings within the centre. The centre also has a lower proportion of convenience goods retailers (and floorspace) than the national averages, with the centre's convenience provision primarily coming from the large Waitrose foodstore at Station Road.
- 9.14** St Ives drew 10% of convenience goods expenditure across the Study Area (74% of which was to central stores, while 26% was to non-central stores) and 6% of comparison goods spend (100% of which was to central retailers).
- 9.15** St Ives has the highest proportion of comparison retailers of each of the District's four key centres and a thriving market (the most popular across the District, attracting 31.2% of all market goers), which reflects the draw of the independent comparison goods traders that have come to define St. Ives.
- 9.16** The convenience goods market share of **Ramsey** has increased from 3.4% to 3.9% since 2010, (7% of which was to central stores, while 93% was to non-central retailers). This

reflects the lack of any national multiple convenience retailers in the centre, with the town primarily being served by the out-of-centre Co-op and Tesco foodstores. With regards to comparison goods spend, Ramsey had a market share of 1.2% (92% to central retailers, while 8 % was to non-central stores), marginally increasing from 1.0% in 2010.

- 9.17** Ramsey has the fewest retail units of all of the District's centres and the largest proportion of vacant floorspace across Huntingdonshire (2.5% above the UK average), although the vacancy rate has improved since 2010. This though is in part due to a number of units lost from the centre through conversion to residential dwellings. Ramsey has an above average proportion of convenience and comparison retailers (a significant number of which are independent traders) and a lower than average service offer, which is predominantly made up of cafes, takeaways and health and beauty facilities.

E-tailing

- 9.18** The household survey also provided details of shopping made by Special Forms of Trading (SFT), including online shopping or 'E-tailing', which identified that the proportion of online convenience spending varied from town to town. This pattern identified that, in towns that are well catered for in terms of choice and access to convenience retailers (such as Huntingdon, St Neots and Ramsey), a lower proportion of residents were shopping for convenience goods over the internet, whilst a higher proportion of online convenience shopping was undertaken in zones directly adjoining market town centres or zones where there was less competition. Residents of more rural zones across the District carried out online shopping closer national average levels (5.1%), suggesting that online convenience spending is typically utilised to 'top-up' main food shopping trips where there is not a wide range of convenience retailers within an easily accessible distance.
- 9.19** In terms of comparison goods spending, a significant proportion of books and other media, toys and recreational goods and electrical items were purchased online by residents across the Study Area. In particular, St Ives was shown to have the highest proportion of online comparison goods spending, whilst Ramsey had the lowest. This is likely due to the fact that the St Ives is defined by the high proportion of specialist independent traders, which provide a niche and varied comparison goods retail offer, though not comprehensive enough to fully cater for residents' needs. Online shopping therefore provides the opportunity for residents to purchase additional, complementary goods that are not offered in physical stores within the centre. Ramsey, on the other hand, is largely served by a number of 'generalist' independent comparison goods stores that do not provide a suitably varied comparison goods retail offer, instead providing more day-to-day essentials. Residents are therefore seen to travel further afield to centres with a greater comparison offer, such as Peterborough, and are therefore

less likely to need to supplement these trips with significant additional online spending.

- 9.20** Notably, all of the E-tailing identified in the household survey was received through a home delivery service, with no noticeable proportion of residents utilising 'click and collect' hubs. Given the significant growth in E-tailing in recent years, we would note that there appears to be a gap in the market for retailers to offer further in-store collection services and better advertise existing online shopping collection facilities, which can often result in spin-off 'linked' trade as well as acting as a further draw to bring residents into town centre stores. Equally, standalone 'click and collect' facilities and lockers are becoming increasingly popular in town centre locations for the same reason, and provide additional choice and competition, giving residents convenient access to retailers that may not have been able to offer home delivery services.

Leisure

- 9.21** In terms of leisure facilities, Section 8 does not identify District wide capacity for any of the activities that we are readily able to forecast into the future (health and fitness clubs, cinema screens or ten-pin bowling lanes).
- 9.22** On the basis of the proportion of trips made by residents to restaurants outside the District though, we consider that there is qualitative justification for an increase in the provision and diversity of restaurants in the District, in particular to support Zones 2b (St Ives Fringe) and 6 (South Peterborough) where over half of residents surveyed travelled outside of the District for their most recent restaurant trip. In these instances, we would recommend that, as a main town centre use, any new leisure development be directed towards the nearest town centre in accordance with the sequential approach. Nonetheless, it is important to recognise that this capacity is subject to market forces dictating demand in order to meet any identified gaps in leisure provision across the District.
- 9.23** Additionally, whilst the majority of respondents were content with the provision of leisure facilities across the District, there was indication of public demand for a new swimming pool.

Retail Strategy and Recommendations

- 9.24** The retail capacity analysis undertaken at Section 7 identifies a total 'District wide' capacity for between 2,000 sq m and 2,500 sq m of new convenience goods net retail floorspace in Huntingdonshire, and between 18,200 sq m and 28,500 sq m of new comparison goods net retail floorspace at 2036.
- 9.25** We set out our capacity forecasts and recommendations for future floorspace requirements

at Figure 9.1. This assessment considers each of the District's town centres, as well as the three strategic expansion locations proposed in the draft Local Plan to 2036.

Figure 9.1 | Recommended Capacity for Retail Floorspace at 2036

	Recommended Floorspace Capacity at 2036 (sq m net) ¹	
	Convenience	Comparison
Huntingdon Town Centre	600 sq m to 900 sq m	7,800 sq m to 12,300 sq m
Alconbury Weald SEL	1,000 sq m to 1,200 sq m	1,700 sq m to 2,600 sq m
St Neots Town Centre	0 sq m	3,300 sq m to 5,100 sq m
St Neots East SEL	0 sq m	1,100 sq m to 1,800 sq m
St Ives Town Centre	900 sq m to 1,100 sq m	2,000 sq m to 4,000 sq m
Wyton-on-the-Hill SEL	900 sq m to 1,100 sq m	1,500 sq m
Ramsey Town Centre	-1,300 sq m to -1,700 sq m	600 sq m to 900 sq m
<i>Other rural and local shopping centres</i>	<i>-100 to -200 sq m</i>	<i>200 sq m to 300 sq m</i>
District Total	2,000 sq m to 2,500 sq m	18,200 sq m to 28,500 sq m

¹ Capacity figures are informed by Figures 7.1-7.17 and Nexus Planning analysis which follows.

² Figures may not add due to rounding.

Source: Appendix D

Huntingdon Town Centre and Alconbury Weald SEL

- 9.26** In calculating the local retail floorspace capacity for Huntingdon Town Centre identified in Figure 9.1, we take account of the fact the town is intended to serve the existing local catchment area as well as both Alconbury Weald and (along with St Ives) Wyton-on-the-Hill strategic expansion locations. Moreover, the Cambridgeshire Research Group population data provided by the Council incorporates the projected populations of the strategic expansion locations into the underlying population forecasts. As such, the total capacity exercise for Huntingdon includes capacity associated with the proposed strategic expansion location; a proportion of which we have recommended may be better located on site.
- 9.27** We calculate that Alconbury Weald could support between 1,000 sq m and 1,200 sq m (net) of convenience goods floorspace by 2036, which we would consider appropriate to support the intermittent top-up convenience goods needs of a new community of circa 5,000 new households and the surrounding hinterlands, noting that the majority of main food spend is to

be directed towards existing convenience facilities in the higher order Huntingdon Town Centre, which we calculate would support an additional 600 sq m 900 sq m of new convenience goods floorspace by the end of the plan period.

- 9.28** However, the Council could still be supportive of appropriate foodstore planning applications within or adjacent to Huntingdon Town Centre before this period (subject to compliance with the sequential approach and impact assessment requirement), as there are currently significant levels of overtrading at the out-of-centre Lidl (Stukeley Road), Tesco Express (Wertheim Way) and Tesco Extra (Abbots Ripton Road) that would be beneficial to ‘claw back’ to the town centre.
- 9.29** Turning to comparison goods floorspace, we identify capacity for between 1,700 sq m and 2,600 sq m (net) comparison retail floorspace at Alconbury Weald by 2036 on the basis of an assumed retention rate of 20%, which we consider to be suitable to support day-to-day shopping for comparison goods whilst directing the majority of spending towards Huntingdon Town Centre, which would have capacity to support a significant quantum of new comparison goods floorspace (between 7,800 sq m and 12,300 sq m by 2036).
- 9.30** Whilst this capacity for new comparison goods floorspace is modelled on the basis of a constant market share, the provision of comparison goods floorspace to meet the identified growth is likely to enable the ‘claw back’ of leakage to Cambridge, boosting the resilience of Huntingdon Town Centre.
- 9.31** We would suggest monitoring the health and performance of the town centre in the aftermath of the completion of the Chequers Court development in order to assess how the introduction of the national multiple retailers Next and Marks and Spencer (as currently proposed) assist in ‘clawing back’ trade, given that both retailers had left units in Huntingdon in recent years and the identified increase in leakage of comparison goods trade to Cambridge since the 2010 Study (which has been seen across the Study Area, but is especially notable from Huntingdon). On the other hand, there is also the potential that the Chequers Court development will draw footfall or investment from other parts of the centre, such as St Benedict’s Court where there are a number of vacant units. This will need to be considered with the introduction of any additional retail space going forward.
- 9.32** In terms of the qualitative need for new development in the town centre, it is noted that Huntingdon’s night time economy is not as healthy as competing centres, particularly considering that it is the largest centre in the District. It is anticipated that the recent renovation of the Falcon Public House and the opening of both the Wetherspoons Bar and the Da Vinci’s Wine Bar may bolster this and draw residents to the centre in the evenings.

The impact of these developments should be monitored, with a view to potentially supporting these units with complimentary uses such as restaurants and leisure facilities to boost the attraction of the centre's evening economy.

- 9.33** Whilst the frequent market events were seen to be a positive draw to the centre, the Market Hill square would appear to be underutilised. Opportunities to increase activity in this area through community events and activities should be welcomed.

Huntingdon West Area Action Plan site

- 9.30 In identifying capacity for the provision of new convenience retail facilities over the plan period we are mindful of the relatively recent withdrawal of Sainsbury's from the Huntingdon West Area Action Plan site in 2015 and the modification of the Chequers Court development to sub-divide and reduce the convenience good floorspace of the proposed foodstore in 2014, which follows the trend of national multiple convenience retailers such as Sainsbury's and Tesco holding back previously committed investment in recent years. Nonetheless, our quantitative capacity model forecasts sufficient growth in available expenditure over the plan period to support such development by 2021 at the earliest.
- 9.31 Whilst the Study does not seek to identify specific sites for the provision of retail and leisure development, we do note the conclusions of the Study in 2010 that a comprehensively designed development of the George Street/ Ermine Street area "*could function as a genuine extension to the town centre*" in conjunction with the Council's longstanding policy position to extend Huntingdon Town Centre culminating in the adoption of the Huntingdon West Area Action Plan in 2011.
- 9.32 As referenced in Section 3, Policy HW4 of the AAP allocates sites in the George Street/ Ermine Street area for the development of 5,350 sq m of net internal retail floorspace **that is complementary to the continuing vitality and viability of the town centre that does not jeopardise the delivery of further redevelopment at Chequers Court** (our emphasis).
- 9.33 Given the ongoing development of comparison goods floorspace at the Chequers Court site (as referenced in both the policy text and the 2010 Study) the majority of this allocation was to be taken up by the former proposal for a 5,275 sq m (NIA) Sainsbury's foodstore of which 3,587 sq m (NIA) was to be used for the sale of convenience goods, to be supplemented by an appropriate and complimentary mix of further comparison goods facilities.
- 9.34 We calculate capacity for between 600 sq m and 900 sq m of net convenience goods floorspace in Huntingdon Town Centre by 2036 (excluding capacity to be directed towards the Alconbury Weald SEL). As such, considering the sequentially preferable location of the

land at George Street/ Ermine Street, its current allocation for retail use within Policy HW4 of the Huntingdon West Area Action Plan and previous Studies' longstanding recommendations for an additional foodstore to support Huntingdon Town Centre, we would suggest that between 600 sq m and 900 sq m of the 2.7 ha site be retained as a retail allocation to meet the town centre's identified convenience retail capacity.

- 9.35 As previously highlighted, the text accompanying Policy HW4 of the AAP emphasises that retail development at the George Street/ Ermine Street area should not jeopardise the viability or delivery of Chequers Court and that – as a town centre site – Chequers Court should remain the preferential location for comparison retail floorspace in Huntingdon, particularly noting that comparison goods retailers benefit from being located in clusters of similar uses so as to form a greater draw and to facilitate linked trips and spin off trade. As such, we are mindful of the need to monitor and not jeopardise the delivery of the Chequers Court development and the likelihood of retail occupiers coming forward for the entirety of the site.
- 9.36 Nonetheless, given the substantial capacity for new comparison goods floorspace across both Huntingdon (between 7,800 sq m and 12,300 sq m by 2036) and the wider District as a whole (between 18,200 sq m and 28,500 sq m by 2036), there remains scope for the development of comparison retail floorspace on the site, which remains a key opportunity to meet the identified comparison retail goods capacity in light of the physical constraints for such development within the existing town centre.
- 9.37 We would recommend that the Council allocates the site as follows:
- A convenience goods retail development of no less than 600 sq m (net) and no more than 900 sq m (net) to support Huntingdon Town Centre and the emerging population of any residential development on sites within the Huntingdon West Area Action Plan; and
 - The remainder of the site should be allocated for the development of complementary comparison goods retail uses, noting that any such development should not jeopardise the ongoing viability of the Chequers Court development or place an undue burden on applicants. In light of the above, we recommend that the Council seeks to restrict development of alternative uses unless evidence is provided that the site has recently been actively marketed at a reasonable market price/rent and that reasonable attempts have been made to find a comparison goods retail occupier.
- 9.38 It is relevant to note that the market largely dictates when such developments come forward and, particularly when considering the current development programme of the major foodstore operators, available capacity does not necessarily equate to demand.

- 9.39 Equally, subject to the required retail impact assessment, such developments may proceed prior to such capacity becoming available, given the potential to 'claw back' trade from competing out-of-centre facilities. We would stress that, in accordance with national planning policy and guidance, applications for retail developments above the locally set threshold and outside of the designated Town Centre boundaries would need to be considered in accordance with the sequential approach and standard impact assessment methodology.
- 9.40 The Council's approach and specific policy wording will need to be carefully balanced in order to ensure that the vitality and viability of the District's designated centres are not undermined, whilst catering for the identified retail capacity.

St Neots Town Centre and St Neots East SEL

- 9.41 The capacity assessment for St Neots incorporates the projected population increase associated with the proposed development of the St Neots East strategic expansion location.
- 9.42 St Neots East strategic expansion location is expected to include an element of retail floorspace to cater to the day-to-day needs of the emerging community of approximately 3,820 new households, and the model also takes into account the recently approved applications for both Aldi and Lidl foodstores at Howard Road and Great North Road in Eaton Socon. As such, no capacity for new convenience retail floorspace is identified in St Neots.
- 9.43 We also consider that, qualitatively, St Neots is well catered for in terms of convenience offer in the town centre. Waitrose, Marks and Spencer, Iceland, Co-op and Lidl, in addition to a number of smaller, specialist stores, provide an appropriate provision for a town of St Neots' size as evidenced by the high retention rate of 94% of residents' convenience spend.
- 9.44 The convenience floorspace capacity calculations are modelled on the basis of the development of the extant permissions for the out-of-centre Lidl foodstore off Great North Road in Eaton Socon and Aldi store at Howard Road industrial estate, and subject to the longer term retention of the existing town centre Lidl at Cambridge Street as a convenience goods retailer. In a scenario where the Lidl store at Eaton Socon comes forward and Lidl exit the existing town centre site on Cambridge Street, we suggest that the site (as an existing retail use within the town centre) be retained for convenience retail use. Were the town centre site to cease trading as a convenience location, we suggest that the convenience floorspace capacity assessment for St Neots Town Centre be revisited.
- 9.45 In terms of comparison goods, we suggest that the Council allow for the provision of small comparison goods units in the proposed strategic expansion location (of between 1,100 sq m and 1,800 sq m in total) to support the day-to-day needs of the emerging population at St

Neots East, whilst protecting St Neots Town Centre as a higher order centre to provide for the remainder of comparison goods capacity.

- 9.46 This is particularly relevant as St Neots currently retains just 50% of all comparison goods spending from local residents in Zone 10 (down from 54% in 2010), with almost all of the rest of comparison spend leaking to retailers outside of the District's four town centres. Comparison goods retailers benefit from being located in clusters of similar uses to allow for linked trips and spin off trade, to provide a suitable draw to both new occupiers and local residents in order to compete with retailers in higher order regional centres such as Cambridge, Peterborough, Bedford and Milton Keynes.
- 9.47 St Neots caters for just 5.4% of clothing and footwear spending from residents across the Study Area, less than half of Huntingdon's market share. This is considered especially low for a centre of St Neots size and position in the market and we would encourage efforts to increase the clothing and footwear offer of the town centre.
- 9.48 Whilst St Neots has a vacancy rate below the national average, there are a number of large, long term vacant units in prominent locations that currently detract from the appearance of the town centre. In particular, the old public house that fronts onto the Market Square offers a prime opportunity for a retail and/or restaurant uses that would provide an additional draw to the town centre, particularly considering its excellent riverside location.

St Ives Town Centre and Wyton-on-the-Hill

- 9.49 In addition to the forecast growth of the existing population within the St Ives catchment area, St Ives Town Centre (along with Huntingdon Town Centre) is intended to jointly serve the majority of the retail requirements of new residents of the potential Wyton-on-the-Hill strategic expansion location.
- 9.50 St Ives' convenience retail offer is represented primarily by the Waitrose and Budgens in the town centre and Co-op outside the town centre. An extant permission for an out-of-centre Morrisons foodstore, carpark and petrol filling station is considered unlikely to proceed, with the operator yet to formally announce their intentions for the site having been granted outline planning permission in 2014.
- 9.51 The convenience capacity assessment supports between 900 sq m and 1,100 sq m of new floorspace to cater to the day-to-day top-up shopping needs of the emerging population of the Wyton-on-the-Hill strategic expansion location – whilst directing the majority of convenience trade to St Ives and Huntingdon Town Centres – as well as an additional 900 sq m and 1,100 sq m of new floorspace within St Ives Town Centre to support the existing retail

provision. This would also allow for increased competition and a wider range of convenience goods in St Ives Town Centre, which is currently dominated by Waitrose, as well as helping to 'claw back' convenience store expenditure that is currently attracted to supermarkets outside of the town.

- 9.52 Qualitatively, given the likelihood that the Morrisons foodstore is not coming forwards, St Ives could benefit from the introduction of a foodstore to provide competition to the Waitrose foodstore that is currently performing well (at 94% over national benchmark) and to increase the range and offer of convenience goods available in the town centre in order to reduce resident's need to travel to foodstores outside the town centre.
- 9.53 Turning to comparison goods floorspace, in light of Wyton-on-the-Hill's proximity to St Ives and Huntingdon and the emerging policy position to direct the majority of retail expenditure to these higher order centres, we recommend planning for a modest comparison goods floorspace of just 1,500 sq m net in order to encourage the majority of additional comparison goods spending towards the town centres. Taking into account our recommendations regarding the provision of new comparison goods floorspace within Wyton-on-the-Hill, we estimate capacity for between 2,000 sq m and 4,000 sq m (net) comparison goods floorspace in St Ives Town Centre by 2036.
- 9.54 St Ives has shown relatively little change in market share and diversity of uses within the town centre since the 2010 Study. There has though been a notable increase in service facilities which could, in part, be due to increased tourist trade as a result of St Ives' position on the Cambridgeshire Guided Busway route. This has provided St Ives with an opportunity to focus on expanding the provision of service facilities in order to emphasise St Ives' role as a tourist destination. There is a key opportunity to further expand on St Ives' tourist role with a further emphasis on its waterside location and its reputation for local markets and events.
- 9.55 We note that 49% of residents' expenditure is to retailers outside of the District and St Ives would benefit from the development of additional comparison goods retailers in the town centre to support the growing tourist economy, in addition to catering to the needs of local residents.

Ramsey Town Centre

- 9.56 Whilst Ramsey has a higher proportion of convenience retailers than the UK average, the centre's convenience retail offer is currently dominated by the Co-op at Newtown Road and Tesco foodstore on Neil Way, both of which are currently estimated to be trading below company averages, reflected in the anticipated closure of the Co-op in January 2017. This has resulted in a deficit of available convenience expenditure up to 2036. As such, we do not

currently forecast any quantitative capacity for new convenience retail floorspace within Ramsey over the plan period, suggesting that the centre is more than well provided for by the large out-of-centre and edge-of-centre convenience retailers for a centre of its size.

- 9.57 Nonetheless, in qualitative terms, the Council could still be supportive of appropriate foodstore planning applications within Ramsey Town Centre. Currently, the majority of convenience goods trips are to the edge-of-centre Co-op and out-of-centre Tesco and, as most of these trips are done by car, the introduction of a suitable convenience goods retailer has the potential to increase footfall in the centre as well as 'clawing back' convenience spend and increasing the resilience of the town centre.
- 9.58 Turning to comparison goods facilities, we estimate a total capacity for between 600 sq m and 900 sq m (net) floorspace in Ramsey by 2036. During stakeholder discussions, local residents highlighted a lack of clothing retailers in the town centre and, in light of the limited capacity for new retail floorspace over the plan period, we would recommend a focus on improving the draw and attraction of Ramsey through local events and the rebranding of the town centre to reflect Ramsey's local landscape, heritage and tourism offer.
- 9.59 On the basis of the above findings, it may be suitable for the Council to consider contracting the boundaries of Ramsey Town Centre in order to focus retail activity, easing restrictions on the conversion of unviable units to encourage new investment for alternative uses in order to boost vitality and vibrancy in the centre and introduce indigenous footfall and activity through a new residential population.

Other rural and local shopping centres

- 9.60 Nexus Planning also undertook an assessment of the District's other rural and local shopping centres, modelling the capacity for new retail floorspace outside of the four main town centres of Huntingdon, St Neots, St Ives and Ramsey.
- 9.61 We estimate no capacity for new convenience floorspace over the plan period and limited capacity for new comparison retail goods floorspace (between 200 sq m and 300 sq m by 2036) to support day-to-day comparison goods requirements in rural settlements on the basis of current market shares.

Local Retail Impact Thresholds

- 9.62 In accordance with national planning policy, retail, office and leisure developments greater than 2,500 sq m proposed in edge-of-centre and out-of-centre locations will be subject to the assessment of the impact criteria set out by Paragraph 26 of the NPPF.

- 9.63 Where appropriate, Local Authorities are entitled to identify local thresholds in accordance with the following considerations identified within the NPPG ('Ensuring the vitality of town centres', Paragraph 16):
- scale of proposals relative to town centres;
 - the existing viability and vitality of town centres;
 - cumulative effects of recent developments;
 - whether local town centres are vulnerable;
 - likely effects of development on any town centre strategy; and
 - impact on any other planned investment.
- 9.64 The 2013 Retail Study (Deloitte) supported the local thresholds for retail proposals greater than 600 sq m (net), as proposed in the Council's (then) emerging Local Plan.
- 9.65 In assessing this position, we have regard to the average size of units in each of the four centres, which identifies relatively little variation with the average occupied town centre unit measuring 224 sq m in Huntingdon, 185 sq m in St Neots, 155 sq m in St Ives and 141 sq m in Ramsey (sourced from Experian Goad).
- 9.66 It is also relevant to note the existing trading patterns of the centres, so as to establish their vulnerability to the development of additional edge-of-centre and out-of-centre retail stores. By way of example, whilst the household survey identifies that 50% of convenience spend and 60% of comparison spend in Huntingdon was made to town centre stores, the Tesco Extra to the north of Huntingdon at Abbots Ripton Road (Zone 4) is the second highest performing convenience store in the District and draws as much expenditure as all convenience stores in Huntingdon Town Centre combined. Equally, whilst the majority of comparison goods spending in St Neots is made to retailers within the town centre, only 33% convenience trade is made to central stores, with a significant proportion of residents shopping at Tesco Extra, Barford Road (the highest performing convenience retailer in the District). Finally, whilst the vast majority of convenience and comparison spend in St Ives and comparison spend in Ramsey is made to central stores, only 7% of convenience spend in Ramsey is to central stores, with both the Co-op and the Tesco located out-of-centre.
- 9.67 We have also taken account of the on-going consolidation of a number of units in Huntingdon and the current Chequers Court development, which will provide units with larger footprints in order to attract national multiple retailers who had previously left the town centre such as the

confirmed tenants Next (had left in 2013) and Marks and Spencer (had left in 2009). This trend reflects our understanding that the current retail market favours larger and more flexible units that might not be available in constrained town centres, leading retailers to pursue edge and out-of-centre units that would directly compete with the town centre offer, thereby jeopardising the vitality and viability of the centres.

- 9.68 We therefore conclude that each of the four centres are potentially vulnerable to edge-of-centre and out-of-centre developments of 'big box' retail destinations and smaller, town centre parade style units that directly compete with the town centre offer, jeopardising the vitality and viability of the centres and that the threshold should reflect the smaller floorplates of the existing retail facilities across the centres.
- 9.69 As such, we agree with the previously recommended locally set threshold of **600 sq m (net) across the District**.
- 9.70 In addition, we would recommend encouraging the amalgamation of units (where there is little, or marginal, loss of net retail floorspace) in order to encourage investment in the District's centres.
- 9.71 We would stress that whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the recommended threshold of 600 sq m, national guidance dictates that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with Council officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

Town Centre Resilience

- 9.72 In quantitative terms, we find capacity for new convenience retail developments in Huntingdon and St Ives over the plan period. In comparison terms, we calculate capacity for new floorspace in Huntingdon, St Neots, St Ives and Ramsey up to 2036 (as well as a small allowance for new comparison goods development in other rural and local shopping centres in the District).
- 9.73 There is a limit to how much online shopping and out-of-centre retail facilities can fully meet the daily needs of consumers, and changes in consumer habits have driven a return to smaller format shops in more centrally located and accessible locations, which provides an opportunity to 'claw back' trade to market towns.

- 9.74 In recent years, town centres have seen a trend towards a greater proportion of service facilities, with shoppers increasingly attracted to coffee shops and grab-and-go convenience food outlets that compliment 'pure' retail units and provide opportunities to 'graze' whilst shopping.
- 9.75 Household survey results identified that residents of Huntingdonshire did not take advantage of click and collect hubs across the town centres, or the option for delivery and collection of online shopping orders in-store, despite the availability at a number of retailers in the District. Whilst these low participation figures may be due to a wider lack of awareness of the available options when it comes to online shopping delivery methods, it does indicate that there is scope for the greater integration of click and collect and other digital technologies to complement the draw of the District's market centres, particularly given the high proportion of online spending on books and other media goods.
- 9.76 Huntingdon benefits from a strong comparison goods offer and a high proportion of national multiple retailers, but competes with nearby higher order centres such as Cambridge for resident comparison goods spending. As such, we would recommend that the Council concentrates efforts on ensuring the success of the forthcoming town centre development at Chequers Court, investing in maintaining the legibility and accessibility of the centre and integrating the new retail units with the rest of the centre. Given the continued draw of more accessible out-of-centre foodstores (despite the relatively wide range and choice of convenience retailers in the town centre), Huntingdon would benefit from retailer efforts to promote town centre click & collect facilities. We would also recommend that the Council continues to support facilities such as cafes and restaurants that contribute to Huntingdon's night time economy (building upon the recent pub and bar developments) in order to assist in establishing the centre as a 'destination' in support of existing and forthcoming retail offer.
- 9.77 St Neots is well provided for in terms of the range and offer of foodstores (both in and outside of the town centre) and attracts an especially high proportion of local residents' convenience spending. St Neots has the highest proportion of national multiple retailers in the town centre, in addition to a well supported weekly market and monthly farmers market that complement the town centre offer. Household survey results show that 6.1% of respondents who visit St Neots do so for the environmental quality, which was the highest score of all four centres and indicates that the quality of the streetscape plays a significant role in residents' view of the centre and should be encouraged. St Neots also benefits from a vibrant night time economy and a wide provision of restaurants and cafes, particularly at the Market Square and the recent Cineworld complex. There are, however, two notable vacant units at 10-12 Market Square and 19 Brook Street that detract from the character of the surrounding streets and offer the opportunity to positively contribute towards the thriving food and drink economy in St

Neots.

- 9.78 St Ives benefits from a wide range of independent comparison goods retailers, as well as a number of traditional and specialist markets and town centre events that take advantage of the centre's local character and riverside location, providing a significant draw to both local residents and shoppers across the District. We would recommend that the Council promotes the flexible use of retail floorspace to continue to support the development of the St Ives' independent traders, as well as services such as cafes and restaurants (which are currently represented at below national average levels). There is an opportunity to develop active frontages to take advantage of the centre's picturesque location on the river, as well as to redevelop the existing Waitrose foodstore and Bus Station to provide better links to the town centre. Such developments would support St Ives' independent traders and markets in providing a draw for visitors from further afield and encouraging shoppers to spend more time in the town centre.
- 9.79 Ramsey, as the smallest of the District's market towns, has very few national multiple retailers and has experienced a small reduction in units since 2010, with a number of units converted to residential dwellings. Such conversions can increase the vitality and vibrancy of town centres through the introduction of footfall from a local resident population but – if unchecked – can also reduce the retail offer and detract from the draw of the centre. We would recommend that the Council monitors the change of use of retail units in Ramsey to better establish the impact of such developments on the health of the centre. Whilst we do not identify a quantitative capacity for new convenience goods floorspace in Ramsey over the plan period, the Co-op has announced that it is to close and there is very little range of convenience goods available (with the out-of-centre Tesco Superstore catering for the majority of local residents). This would suggest that there is a qualitative capacity for a new convenience offer in the centre, which would provide an additional draw to residents who currently travel further afield to undertake their main food shopping. Given the prevalence and accessibility of on street parking along the Great Whyte, there is an opportunity to invest in new signage and attract a specialty market to the centre, as well as provide additional outdoor seating and other street furniture, which is currently lacking. We would also suggest that the Council supports a more flexible approach to retail floorspace (for example through the amalgamation and division of units) in order to better facilitate new independent traders and the expansion of existing retailer that may not be well suited to the constraints of the existing units and floorplates in the centre.

Glossary of Terms

Capacity:	Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace <i>Source: Planning Portal</i>
Comparison Goods:	Retail items not bought on a frequent basis, for example televisions and white goods (fridges, dishwashers etc.) <i>Source: Planning Portal</i>
Convenience Goods:	Everyday essential items, such as food <i>Source: Planning Portal</i>
Edge-of-Centre:	For retail purposes, a location that is well connected and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances <i>Source: NPPF</i>
Expenditure per Capita:	The amount of money spent on retail goods per person in each Zone across the Study Area
Expenditure:	Average annual expenditure levels for various forms of goods, multiplied by the population within the defined Study Area.
Experian Goad:	Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK and Ireland.
Experian (MMG3):	A population, expenditure and socio-demographic dataset that utilises the 2011 Census release, projected forward by using growth rates derived from Office for National Statistics projections and current age and gender estimates.

Independent Retailers:	Retailers with less than 10 outlets/ stores <i>Source: Experian</i>
Goad Plans:	A plan showing a bird's eye view of a retail centre including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations <i>Source: Experian</i>
Main Town Centre Uses:	Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities) <i>Source: NPPF</i>
Market Share:	The proportion of residents that visit a particular retail destination, derived from household survey results
National Multiple:	Defined as retailers with ten or more stores/ outlets <i>Source: Experian</i>
Primary shopping area:	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage) <i>Source: NPPF</i>
Primary/ secondary frontages:	Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses <i>Source: NPPF</i>
Retail Floorspace:	Total floor area of the property that is associated with all retail uses in square metres. May be expressed as a net figure (the sales area) or in gross (including storage, preparation and staff areas) <i>Source: Planning Portal</i>

Retail Impact:	<p>The potential effects of proposed retail development upon existing shops</p> <p><i>Source: Planning Portal</i></p>
Sequential Approach:	<p>A planning principle that seeks to identify, allocate or develop certain types or locations of land before others. For example, brownfield housing sites before greenfield sites, or town centre retail sites before out-of-centre sites</p> <p><i>Source: Planning Portal</i></p>
Sales Density:	<p>Turnover, per square metre. Various retail planning sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or benchmark) sales densities for national multiple convenience retailers</p>
Special Forms of Trading:	<p>Special forms of trading (SFT) are defined as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies</p> <p><i>Source: Experian</i></p>
Study Area:	<p>The geographical area where the household survey is carried out, based on postal sectors that make up the 13 zones that broadly cover Huntingdonshire District, as well as hinterlands within Bedford and Cambridgeshire where shoppers may be attracted to Huntingdonshire's retail and leisure offer</p>
Trade draw:	<p>The proportion of trade that a development is likely to receive from customers within and outside its catchment area. It is likely that trade draw will relate to a certain geographic area (i.e. the distance people are likely to travel) and for a particular market segment (e.g. convenience retail). The best way of assessing trade draw where new development is proposed is to look at existing proxies of that type of development in other areas</p> <p><i>Source: NPPG</i></p>
Turnover:	<p>Amount of sales per unit area of retail floorspace</p> <p><i>Source: Planning Portal</i></p>
Town Centre:	<p>Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main</p>

town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres

Source: NPPF