

Fenland District Council FENLAND DISTRICT RETAIL STUDY



ROGER TYM & PARTNERS
Planners and Development Economists

Final Report
August 2006

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CONTENTS

| | | |
|----------|---|-----------|
| 1 | INSTRUCTIONS AND OUTLINE OF REPORT | 1 |
| | Instructions | 1 |
| | Structure of Remainder of Report | 1 |
| 2 | THE REQUIREMENTS OF NATIONAL PLANNING POLICIES | 3 |
| | Introduction | 3 |
| | The Government's Objectives | 3 |
| | Positive Planning for Town Centres: A Plan-led Approach | 4 |
| | Development Control | 9 |
| | Monitoring and Review | 12 |
| | Conclusions and Changes in Emphasis | 13 |
| 3 | THE REGIONAL AND LOCAL PLANNING POLICY CONTEXTS | 15 |
| | Regional Planning Policy | 15 |
| | Sub-Regional and Local Planning Policy | 19 |
| | Town Centre Health Check Studies | 25 |
| 4 | REVIEW OF KEY RETAIL AND LEISURE MARKET TRENDS | 29 |
| | Introduction | 29 |
| | Retail Sector | 29 |
| | Leisure Sector | 41 |
| | Household Disposable Income and Final Consumption Trends | 41 |
| 5 | PERFORMANCE ANALYSIS AND TOWN CENTRE BOUNDARIES | 47 |
| | Performance Analysis - Introduction | 47 |
| | Performance Indicators | 47 |
| | Summary of the Retail Performance of Fenland District's Market Towns | 57 |
| | Town Centre Boundaries | 58 |
| 6 | CURRENT PATTERNS OF RETAIL AND LEISURE VISITS | 63 |
| | Introduction | 63 |
| | Methodology | 63 |
| | Comparison Shopping Patterns | 65 |
| | Convenience (Food and Groceries) Shopping Patterns | 69 |
| | Leisure Patterns | 71 |
| | Conclusions on Retail and Leisure Spending Patterns | 73 |
| 7 | QUANTITATIVE RETAIL CAPACITY ANALYSIS | 75 |
| | Summary of Methodology and Data Inputs | 75 |
| | Quantitative Assessment of Need for Further Comparison Sector Floorspace | 77 |
| | Quantitative Assessment of Need for Further Convenience Sector Floorspace | 81 |
| 8 | ASSESSMENT OF SCOPE FOR ADDITIONAL COMMERCIAL LEISURE PROVISION | 87 |
| | Forecast Increases in Leisure Expenditure | 87 |
| | Conversion of Expenditure Increases to Additional Leisure 'Requirements' | 88 |
| | Summary of Scope for Additional Commercial Leisure Facilities | 89 |
| 9 | OVERALL CONCLUSIONS AND KEY RECOMMENDATIONS | 91 |
| | Introduction | 91 |
| | Summary of Performance Analysis and Key Qualitative Needs | 91 |
| | Summary of Quantitative Need | 92 |
| | Opportunities for Meeting Identified Retail and Leisure Needs | 93 |
| | Overall Summary and Key Recommendations | 96 |

TO BE READ IN CONJUNCTION WITH: ANNEX 1 - Appendices to Main Report
ANNEX 2 - Retail & Leisure Capacity Spreadsheets

1 INSTRUCTIONS AND OUTLINE OF REPORT

Instructions

- 1.1 In March 2006, Fenland District Council commissioned Roger Tym & Partners (RTP) to undertake a retail capacity study to inform the Council's Local Development Framework by assessing the role and contribution that the District's four largest centres - Wisbech, March, Whittlesey and Chatteris - can make towards meeting future retail needs.
- 1.2 The study brief defined a number of 'functions' of the study, as well as a range of core tasks, including the need to:
- undertake an assessment of current retail provision - and other uses - in each study centre;
 - assess the current and future need for additional comparison and convenience retail floorspace in Fenland District;
 - assess the capacity for additional commercial leisure uses in the District;
 - provide advice on the most appropriate locations for accommodating identified floorspace requirements, in accordance with the sequential approach as set out in PPS6; and
 - identify town centre boundaries, including primary and the possibility of secondary frontages.
- 1.3 The brief states that the Council intends to use the outputs from the study to inform its planning work in relation to future retail development opportunities and regeneration needs. Accordingly, in the final section of the report we pull together the principal findings from the study in order to identify key quantitative and qualitative needs, and highlight potential locations/sites that the Council may wish to consider for accommodating the identified needs.

Structure of Remainder of Report

- 1.4 The remainder of our report is structured as follows:
- Section 2 outlines the requirements of the national policy context insofar as it relates to town centres and the location of new retail and leisure developments.
 - Section 3 provides a review of the regional and local planning policy contexts.
 - Section 4 sets out the key national trends in various sub-sectors of the retail and leisure markets so as to provide a reference for the remainder of the study.
 - Section 5 sets out the findings of our assessment of each of the study centres in relation to a range of 'performance indicators', taking into account our appreciation of the key issues that are currently affecting - or which could have a bearing on - the centres' performance as foci of retail services and leisure activity.
 - Section 6 provides our assessment of the current patterns of retail spending in the comparison and convenience sectors and the pattern of leisure visits, based on the results of a comprehensive survey of 1,000 households resident within Fenland's overall catchment area.
 - Section 7 assesses the quantitative need for further comparison and convenience retail floorspace in the periods up to 2011, 2016 and 2021 under various scenarios, taking into account claims on expenditure growth.
 - Section 8 provides our assessment of the scope for further commercial leisure development in the District.

- Section 9 outlines our overall conclusions and recommendations, including our assessment of potential opportunities for accommodating the identified need for retail and leisure development in Fenland.
- 1.5 The report is accompanied by two separately bound volumes entitled:
- i) Annex 1: Appendices to the Main Report; and
 - ii) Annex 2: Retail and Leisure Capacity Spreadsheets.

2 THE REQUIREMENTS OF NATIONAL PLANNING POLICIES

Introduction

- 2.1 The relevant national policy context, insofar as it relates to town centres and the location of new retail and leisure developments, is set, in the main, by PPS6, which was published in March 2005. PPS6 replaces¹ PPG6 (June 1996) and the subsequent Parliamentary answers of 5 December 1997 (Raynsford), 11 February 1999 (Caborn) and 10 April 2003 (McNulty). PPS6 also replaces the Government's Responses to the Select Committees of July 1997 and May 2000.
- 2.2 PPS6 is structured under four sections which deal with:
- the Government's objectives;
 - the plan-led approach to positive planning for town centres;
 - the assessment of proposed developments; and
 - measuring and monitoring the vitality and viability of town centres.

The Government's Objectives

- 2.3 The very first paragraph of PPS6 makes it clear that *'sustainable development is the core principle underpinning planning'* and that *'the planning system has a key role in facilitating and promoting sustainable and inclusive patterns of development, including the creation of vital and viable town centres'*. The Government's key objective for town centres², therefore, is to promote their vitality and viability (paragraph 1.3).
- 2.4 The Government's second tier objectives are set out in paragraph 1.4; these can be summarised as:
- enhancing consumer choice;
 - supporting efficient, competitive and innovative retail and leisure sectors and improving their productivity; and
 - improving accessibility to existing and new development by a choice of means of transport.
- 2.5 Paragraph 1.5 then sets out the Government's wider objectives; these can be summarised as:
- the promotion of social inclusion by ensuring access to a range of town centre uses and rectifying deficiencies;
 - the regeneration of deprived areas;
 - the promotion of economic growth;
 - the delivery of more sustainable patterns of development; and
 - the promotion of high quality and inclusive design, enhanced public realm and an accessible and safe environment.
- 2.6 Regional planning bodies (RPBs) and local authorities (LPAs) are therefore required to implement these Government objectives by planning positively for the growth and development of town centres, whilst not restricting competition or innovation

¹ See footnote on page 1 of PPS6.

² See footnote 3 on page 5 of PPS6 which states that references to 'town centres' and 'centres' throughout the policy statement apply to all types of centres described in Table 1 of Annex A, i.e. city, town, district and local centres, but not small parades of purely neighbourhood significance.

(paragraphs 1.6 and 1.7). The main town centre uses to which PPS6 applies are retail, leisure, offices and arts, cultural and tourism facilities (paragraph 1.8), with housing said to be *'...an important element in most mixed-use, multi-storey developments'* (paragraph 1.9).

Positive Planning for Town Centres: A Plan-led Approach

Introduction

- 2.7 The introduction to Section 2 of PPS6 calls upon RPBs and LPAs to:
- actively promote growth and manage change in town centres;
 - define a network and hierarchy of centres, each performing their appropriate role to meet the needs of their catchments; and
 - adopt a proactive and plan-led approach to planning for town centres through regional and local planning.
- 2.8 We consider it appropriate to summarise the requirements in a different and more logical order, starting with the role of regional plans.

The Role of Regional Plans

- 2.9 Paragraphs 2.12 to 2.14 of PPS6 set out the requirements placed on RPBs in developing their Regional Spatial Strategies (RSSs). The over-riding requirement is for RPBs to set out a vision and strategy for the region's growth, particularly for higher level centres, and provide a strategic framework for planning at the local level. In particular, RPBs must:
- develop a strategic framework for the development of a network of centres, taking into account the need to avoid an over concentration of growth in the higher level centres;
 - make strategic choices about those centres of regional and sub-regional significance where major growth should be encouraged;
 - identify the need for new centres to be developed in areas of planned major growth;
 - assess the need for additional floorspace in the comparison retail, leisure and office sectors over the period of the RSS and for five yearly periods within it and, having regard to capacity and accessibility considerations, they must identify where the identified needs would best be met; and
 - identify the need for major town centre development of regional or sub-regional significance.
- 2.10 However, PPS6 is clear that new or expanded regional or sub-regional shopping centres located in out-of-centre locations are unlikely to meet the requirements of national policy (paragraph 2.14).

Networks and Hierarchies

- 2.11 Paragraphs 2.9 to 2.11 of PPS6 provide further advice in relation to the development of the network and hierarchy of centres, but - in this part of the policy statement - the advice is in relation to both the regional and local levels. Thus, authorities must plan carefully how to distribute any identified growth at both regional and local levels. In defining their spatial objectives, RPBs and LPAs:

'...should consider whether there is a need to rebalance the network of centres to ensure that it is not overly dominated by the largest centres, that there is a more even distribution of town centre uses, and that people's everyday needs are met at the local level' (paragraph 2.9).

- 2.12 Thus, in developing the network and hierarchy, RPBs and LPAs are required to consider:
- iii) whether there is a need to avoid over concentration of growth in the higher level centres;
 - iv) the need for investment in those centres requiring to be regenerated; and
 - v) the need to address deficiencies in the network (paragraph 2.9)
- 2.13 Any change in the role and function of centres - upward or downward - must come through the development plan process, rather than through planning applications, with higher order centres dealt with in the RSS and with lower order centres dealt with through development plan documents (paragraph 2.10).

Promoting Growth and Managing Change

- 2.14 Paragraphs 2.3 to 2.8 of PPS6 turn to the role of LPAs in promoting growth and managing change in town centres. Paragraph 2.3 states that LPAs should - within the regional planning context - actively plan for growth and the management of change in town centres over the period of their development plan documents by:
- i) selecting appropriate existing centres to accommodate growth, making the best use of existing land and buildings, but extending the centres where appropriate;
 - ii) managing the role of existing centres through the promotion of specialist activities, or specific types of uses; and
 - iii) planning for new centres of an appropriate scale in areas of significant growth, or where there are deficiencies in the existing network.
- 2.15 Paragraph 2.4 urges that growth should be accommodated, wherever possible, through *'...more efficient use of land and buildings within existing centres'*. However, LPAs *'...should also seek to ensure that the number and size of sites identified for development or redevelopment are sufficient to meet the scale and type of need identified'*.
- 2.16 Where growth cannot be accommodated within existing centres, paragraph 2.5 advises LPAs to plan for:
- i) the extension of the primary shopping area, if there is a need for additional retail provision; and
 - ii) the extension of the town centre, to accommodate other main town centre uses.
- 2.17 Of crucial importance, however, is the Government's recognition that:
- 'Extension of the primary shopping area or town centre may also be appropriate where a need for large developments has been identified and this cannot be accommodated within the centre. Larger stores may deliver benefits for consumers and local planning authorities should seek to make provision for them in this context'* (paragraph 2.6).
- 2.18 However, whilst PPS6 gives recognition to the role of large stores, there is no replication of the provisions of paragraph 3.3 of the now replaced PPG6 which had stated that *'some types of retailers, such as large stores selling bulky goods, may not be able to find suitable sites either in or on the edge of the town centre'*.
- 2.19 Where existing centres are in decline, PPS6 advises LPAs to *'...assess the scope for consolidating and strengthening these centres by seeking to focus a wider range of uses there, promote the diversification of uses and improve the environment'* (paragraph 2.8). However, where a reversal of decline is not possible, LPAs are advised to consider a reclassification of the centre, so as to reflect its revised status in the hierarchy, and the adoption of policies which allow retail units to change to other uses, whilst seeking to retain vital services such as post offices and pharmacies.

The Role of Plans at the Local Level

- 2.20 Paragraphs 2.15 to 2.18 of PPS6 deal, specifically, with the role of the forward planning system at the local level. Paragraph 2.15 requires LPAs to adopt a positive and proactive approach to planning for the future of all types of centres within their areas. Thus, in line with the RSS and their community strategies, LPAs should, prepare a core strategy development plan document which sets out *'...a spatial vision and strategy for the network and hierarchy of centres, including local centres, within their area, setting out how the role of different centres will contribute to the overall spatial vision for their area'*.
- 2.21 Paragraph 2.16 urges LPAs to work with stakeholders and the community so as to:
- i) assess the need for new floorspace for retail, leisure and other town centre uses, taking account of both quantitative and qualitative considerations;
 - ii) identify deficiencies in existing provision, assess the capacity of existing centres to accommodate new development and identify centres in decline where change needs to be managed;
 - iii) identify the centres where development will be focused, as well as the need for any new centres of local importance;
 - iv) define the extent of the primary shopping area and the town centre on their Proposals Map;
 - v) identify and allocate sites in accordance with the considerations set out in paragraphs 2.28 to 2.51;
 - vi) review existing land use allocations;
 - vii) promote investment in deprived areas by identifying opportunities for growth and improved access;
 - viii) set out criteria based policies for assessing proposals on sites not allocated in development plan documents; and
 - ix) distinguish between primary and secondary frontages.
- 2.22 Paragraphs 2.19 to 2.22 of PPS6 then proceed to highlight the need for high quality and inclusive design, the importance of accessibility and safety and the need for efficient use of land through the promotion of higher-density mixed-use development. Paragraphs 2.23 and 2.26 deal with the management of the evening economy and the need for a range of leisure, cultural and tourism activities and paragraph 2.27 seeks to promote the retention and enhancement of existing markets and, where appropriate, the creation of new ones.

Site Selection and Land Assembly

- 2.23 Paragraphs 2.28 to 2.52 deal with site selection and land assembly in the forward planning process. Paragraph 2.28 sets out the five key considerations for local authorities when they are selecting sites for development; these are to:
- a) assess the need for development (paragraphs 2.32-2.40);*
 - b) identify the appropriate scale of development (paragraphs 2.41-2.43);*
 - c) apply the sequential approach to site selection (paragraphs 2.44-2.47);*
 - d) assess the impact of development on existing centres (paragraph 2.48); and*
 - e) ensure that locations are accessible and well serviced by a choice of means of transport (paragraphs 2.49-2.50).'*
- 2.24 These considerations match the development control tests set out in paragraph 3.4 of PPS6. In applying them in the development plan preparation process, LPAs are required to work closely with retailers, leisure operators, developers, other

stakeholders and the wider community and paragraph 2.31 makes it clear that LPAs may need to make choices between competing development pressures in their town centres.

Need for Development

- 2.25 Paragraph 2.32 states that need assessments should be carried out as part of the plan preparation and review process, that they should be updated regularly and that LPAs should take account of the regional spatial strategy. Indeed, the LPAs' assessments of need '*...should inform and be informed by the regional needs assessments and form part of the evidence base for development plan documents*'.
- 2.26 Further guidance on the assessment of need is to be published separately. Paragraphs 2.33 and 2.34 of PPS6 make it clear, however, that LPAs should place greater weight on quantitative need for specific types of retail and leisure developments taking into account population change, forecast change in expenditure for specific classes of goods and forecast improvements in productivity in the use of existing floorspace.
- 2.27 Nevertheless, an important qualitative consideration will be the need to improve the range of services and facilities in deprived areas (paragraph 2.35). Another consideration which may be taken into account in the assessment of qualitative need is the degree to which existing shops may be over-trading (paragraph 2.36). However, regeneration and employment impacts - whilst capable of being material considerations - are not indicators of retail need (paragraph 2.37).
- 2.28 LPAs are also required to assess the need for new office floorspace over the development plan document period. Paragraph 2.39 states that they should take account of the RSS which will incorporate employment forecasts and the identification of suitable broad locations where regionally significant office development should be located (paragraph 2.39). LPAs must also take account of the physical capacity of their town centres and their roles in the hierarchy in planning for new office development and they must consider the needs for other main town centre uses.

Appropriate Scale

- 2.29 Paragraph 2.41 states that:
- 'In selecting suitable sites for development, local planning authorities should ensure that the scale of opportunities identified are directly related to the role and function of the centre and its catchment'*.
- 2.30 As a consequence, paragraph 2.42 states that '*...local centres will generally be inappropriate locations for large scale new development...*' and that LPAs '*...should therefore consider setting an indicative upper limit for the scale of developments likely to be permissible in different types of centres...*'. If a need is identified for larger format developments, paragraph 2.43 indicates that sites should be identified within or on the edge of 'city centres' and 'town centres', as defined in Table 1 of Annex A to PPS6.

Sequential Approach to Site Selection

- 2.31 Paragraph 2.44 of PPS6 sets the order of preference in applying the sequential approach, as follows:
- first, locations within existing centres, but subject to caveats relating to suitability, availability and scale in relation to the function of the centre;
 - second, edge-of-centre locations, with a preference given to sites that are, or will be, well connected to the centre; and then
 - out-of-centre sites, with preference given to sites which are, or will be, well served by a choice of means of transport and those with a high likelihood of forming links with the centre.

- 2.32 It is important to note that the distance threshold for the purposes of the 'edge-of-centre' definition, varies from up to 300 metres from the primary shopping area for retail use, to within 300 metres of a town centre boundary for all other main town centre uses (as set out in Table 2 of Annex a of PPS6). It is also noteworthy that LPAs are required to give weight to those locations that best serve the needs of deprived areas when considering alternative sites at the same level in the sequential ranking (paragraph 2.44).
- 2.33 In line with the earlier advice in the now replaced PPG6, there is a requirement for flexibility and realism on the part of both LPAs and developers/operators when discussing the identification of sites for inclusion in development plan documents. Sites must be available, or likely to become available for development during the development plan document period, and capable of accommodating a range of business models, all parties having been flexible in relation to scale, format, car parking provision and the scope for disaggregation (paragraph 2.45).
- 2.34 A new requirement, however, is for development plan documents to include phasing policies so as to ensure that preferred locations are developed ahead of less central locations (paragraph 2.46).
- 2.35 Further guidance on the sequential approach is to be published separately (paragraph 2.47).

Assess Impact

- 2.36 If LPAs are proposing to allocate sites in 'edge-of-centre' or 'out-of-centre' locations, they must assess the potential impact on centres within the catchment area of the potential development (paragraph 2.48). In our assessment, this provision would seem to confirm that the Government is not seeking to impose a moratorium against 'out-of-centre' development, albeit that such development is likely to be rare. LPAs must also assess the potential impact on other centres of those allocations within a centre which would substantially increase its attraction vis-à-vis other centres (paragraph 2.48).

Ensure Locations are Accessible

- 2.37 Paragraph 2.49 of PPS6 confirms PPG13's aspiration to reduce the need to travel, to reduce reliance on the private car and to ensure that everyone has good access to a range of facilities. As a consequence, in selecting sites for allocation, LPAs are required to have regard to the accessibility of the site by a choice of means of transport and the potential impact of its development on car use, traffic and congestion. In rural areas the focus for development is to be in market towns and large villages.

Other Relevant Matters

- 2.38 After assessing the sites against the five considerations set out in paragraph 2.28 of PPS6, LPAs are able to consider other matters such as physical regeneration, the likely net employment impact, the potential impact on economic growth and the potential impact on social inclusion (paragraph 2.51).

Assembling Sites

- 2.39 Paragraph 2.52 states that LPAs '*...should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their development plan documents...*'. LPAs are also required to consider the scope for site assembly using their CPO powers in order to ensure that suitable sites are brought forward for development.

Designation of New Centres

- 2.40 Paragraph 2.53 repeats the advice that '*new centres should be designated through the plan-making process where the need for them has been established, such as in areas of significant growth, or where there are deficiencies in the existing network of centres,*

with priority given to deprived areas.....whether this is done at the regional or local level will depend on the size of the proposed centre and its proposed role in the hierarchy of existing centres... PPS6 is clear, however, that existing out-of-centre facilities must not be regarded as 'centres', unless they are identified as such in the RSS and/or in development plan documents (paragraph 2.54).

Providing for Local Shopping and Other Services

- 2.41 Paragraphs 2.55 to 2.59 are concerned with the provision for local shopping and other services. There is emphasis on the need for a network of local centres, so as to meet people's day-to-day needs and provide a focus for local services. LPAs are encouraged to seek to rectify any deficiencies in local provision, especially in deprived areas, through liaison with the local community, retail operators and other stakeholders. Further guidance on the preparation of strategies for smaller centres is to be published separately.

Rural Centres

- 2.42 Paragraphs 2.60 to 2.64 of PPS6 deal with rural centres. Market towns and villages, as expected, are to be the main service centres in rural areas and the focus for economic development. Paragraph 2.61 states that the Government is committed to helping market towns manage the process of change and to strengthen their role as service centres, but there is little guidance as to how this aspiration is to be achieved.

Development Control

- 2.43 Section 3 of PPS6 sets out the considerations to be taken into account by LPAs in determining planning applications for **all** proposals relating to main town centre uses - whether in the form of new development, redevelopment, extensions, changes of use, renewals of extant planning permissions or applications to vary or remove existing conditions (paragraph 3.1).

- 2.44 First, it is important to note the provisions of paragraph 3.3, which states that:

'The key considerations for identifying sites for allocation in development plan documents, as set out in Chapter 2, apply equally to the assessment of planning applications,' so that Chapter 3 '...sets out only the additional detail relevant to the consideration of planning applications, and should be read in conjunction with Chapter 2'.

- 2.45 Thus, paragraph 3.4 sets out the same five tests for applicants as apply to LPAs in allocating sites in the development plan preparation process (as set out earlier in paragraph 2.28). We discuss each test in turn, but before doing so we emphasise the provisions of paragraph 3.5, which states that *'...as a general rule the development should satisfy all these considerations'*.

Assessing the Need for Development

- 2.46 The first point to note is that applicants are not required to demonstrate the need for retail proposals located within the primary shopping area, or for other main town centre uses located within the town centre (paragraph 3.8). However, paragraph 3.9 states that *'...need must be demonstrated for **any** application for a main town centre use which would be in an edge-of-centre or out-of-centre location and which is not in accordance with an up to date development plan document strategy'* (our emphasis). There is no minimum floorspace size threshold below which the test of need does not apply.

- 2.47 Additional guidance on the assessment of quantitative need in relation to retail and leisure proposals is set out in paragraph 3.10, which states that the need assessment should be:
- i) based on the assessment carried out for the development plan document, updated as required;

- ii) related to the class of goods to be sold;
- iii) assessed, normally, no more than five years ahead; and
- iv) based on a catchment area that is well related to the size and function of the proposed development and which takes account of competing centres.

Scale

- 2.48 There is no further advice in relation to the issue of scale and paragraph 3.12 merely refers to advice already set out previously in Section 2.

The Sequential Test

- 2.49 The sequential test applies to *'...all development proposals for sites that are not in an existing centre nor allocated in an up-to-date development plan document'* (paragraph 3.13, our emphasis). As is the case with the need test, there is no minimum floorspace size threshold below which the sequential test does not apply.
- 2.50 Paragraph 3.13 goes on to state that the relevant centres in which to search for sites will depend on:
- the overall strategy set out in the development plan;
 - the nature and scale of the development; and
 - the catchment that the development seeks to serve.
- 2.51 In applying the sequential approach developers and operators are required to demonstrate flexibility in relation to scale, format, car parking provision and the scope for disaggregation. The key purpose of the exercise *'...is to explore the possibility of enabling the development to fit onto more central sites by reducing the footprint of the proposal'* (paragraph 3.16); this may involve a reduction in floorspace, more innovative site layouts, multi-storey development and reduced car parking.
- 2.52 Nevertheless, PPS6 retains the onus on LPAs to *be '...realistic in considering whether sites are suitable, viable and available'* (paragraph 3.16). LPAs are also required to *'...take into account any genuine difficulties, which the applicant can demonstrate are likely to occur in operating the applicant's business model from the sequentially preferable site, in terms of scale, format, car parking provision and the scope for disaggregation, such as where a retailer would be required to provide a significantly reduced range of products'*.
- 2.53 Thus, PPS6 explicitly requires that, in determining applications, account be taken of the applicant's business model. Allied to this point, we note the definition of 'retail warehouses' provided in Table 3 of Appendix A to PPS6, namely: *'Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.'* There is an implicit recognition in the last part of the sentence, i.e. *'...catering mainly for car-borne customers'*, that retail warehouses require adjacent surface level car parking.
- 2.54 Paragraph 3.17 retains the requirement to apply the test of disaggregation so as to assess whether the constituent parts of a development proposal that comprises several components can be accommodated on sites in sequentially preferable locations. Whilst paragraph 3.18 would seem to reverse the provisions in draft PPS6 that would have enabled the promoter of a single retail unit to escape the test of disaggregation, we consider the new advice to be confusing and contradictory; the first sentence of paragraph 3.18 seems to say, in effect, that a single retailer or single leisure operator should not be expected to disaggregate, provided the scope for disaggregation has been demonstrated. This is a nonsense and, in our opinion, an early clarification of the provisions of paragraph 3.18 is essential.

- 2.55 Paragraph 3.19 retains the PPG6 tests of 'availability within a reasonable period of time', 'suitability' and 'viability' in applying the sequential test. However, the phrase '*within a reasonable period of time*' is to be determined on the merits of each particular case.

Assessing Impact

- 2.56 Paragraph 3.20 requires impact assessments to be undertaken for any application for a main town centre use which would be in an edge-of-centre or out-of-centre location and which is not in accordance with an up-to-date development plan strategy. Paragraph 3.20 also provides that:

'Where a significant development in a centre, not in accordance with the development plan strategy, would substantially increase the attraction of the centre and could have an impact on other centres, the impact on other centres will also need to be assessed'.

- 2.57 Paragraph 3.21 retains the PPG6 requirement to assess impact on a cumulative basis, taking into account recent permissions, developments under construction and completed developments. There is also an assertion at the end of paragraph 3.21 that '*...the identification of need does not necessarily indicate that there will be no negative impact*'.
- 2.58 In assessing potential impacts LPAs are required to consider the likelihood of:
- risk to the spatial planning strategy for the area;
 - effects on future public or private investment;
 - negative and positive (through clawback) impacts on the turnover of existing centres;
 - changes to the range of services provided by centres;
 - impact on the number of vacant properties in the primary shopping area;
 - changes to the physical condition of the centre and to its role in the economic and social life of the community; and
 - implications for the evening and night-time economy.
- 2.59 The level of detail and type of evidence required is to be proportionate to the scale of the proposal, but impact assessments will be required for all retail and leisure proposals of over 2,500 sq.m gross and occasionally for smaller developments (paragraph 3.23).

Accessibility

- 2.60 In determining whether proposed developments are genuinely accessible, LPAs should assess distance from existing/proposed public transport facilities, frequency and capacity of public transport services and whether access for pedestrians, cyclists and disabled people is easy, safe and convenient.
- 2.61 LPAs must also assess whether the proposal is likely to have impacts on the overall distance travelled by car, local traffic levels and congestion, having taken account of any public transport and traffic management measures secured as a result of the development.

Local Issues and Material Considerations

- 2.62 Paragraph 3.28 confirms the advice in Chapter 2 in stating that material considerations may include physical regeneration, employment considerations, economic growth and social inclusion.

Extensions to Existing Development

- 2.63 Paragraph 3.29 confirms that all of the development control tests apply equally to proposals for extensions to facilities which are located in edge-of-centre and out-of-centre locations, but there is a floorspace threshold for extensions of 200 sq.m below which the sequential approach does not apply.

Ancillary Uses

- 2.64 Shops proposed as ancillary elements to petrol filling stations, motorway service areas, sports stadia, rail stations, airports and so on must be limited in scale, genuinely ancillary and have a limited range of goods.

Conditions

- 2.65 Paragraphs 3.31 and 3.32 retain PPG6's stance in relation to the use of conditions which are designed to ensure that the character of a development cannot change over time so as to create a form of development which is unacceptable. Such conditions include:
- prevention of sub-division;
 - controls on ancillary elements;
 - limits to internal alterations designed to increase floorspace by specifying the maximum floorspace to be permitted, including any floorspace created by mezzanines; and
 - limits to the ranges of goods to be sold and the mix of convenience and comparison goods.
- 2.66 Conditions are also advocated as a means for resolving issues relating to impacts on traffic and the amenity of local residents - for example, controls on the timing of deliveries.

Monitoring and Review

- 2.67 Paragraph 4.1 of PPS6 suggests that comprehensive monitoring is essential to the effective planning and management of town centres. Reference is made to the provisions of the Planning and Compulsory Purchase Act 2004, which requires RPBs and LPAs to submit Annual Monitoring Reports that include analysis of performance against defined core output indicators, those of most relevance being:
- the amount of completed retail, office and leisure development (Indicator 4a); and
 - the percentage of completed retail, office and leisure development in town centres (Indicator 4b).
- 2.68 Paragraph 4.3 identifies three further matters to be kept under review, as follows:
- *'the network and hierarchy of centres (at both the regional and local levels);*
 - *the need for further development (as set out in Chapter 2); and*
 - *the vitality and viability of centres (at the local level)'*

Measuring Vitality and Viability

- 2.69 The final paragraph of PPS6 sets out the key indicators to be used in measuring the vitality and viability of town centres and in monitoring their health; these can be summarised as follows:
- the diversity of main town centre uses (by number, type and amount of floorspace);
 - the amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations;

- the potential capacity for growth or change in the network;
- retailer representation;
- shopping rents;
- the proportion of vacant street level property;
- commercial yields;
- pedestrian flows;
- accessibility;
- customers' and residents' views and behaviour;
- perception of safety and occurrence of crime; and
- the state of the town centre's environment.

Conclusions and Changes in Emphasis

- 2.70 In our assessment, the key changes in national policy emphasis arising as a result of PPS6 are:
- i) a requirement for a much more proactive plan-led approach to planning for town centres through regional and local planning;
 - ii) much more emphasis on the need to develop a network and hierarchy of centres at both the regional and local levels; and
 - iii) a much greater involvement on the part of the public sector in the management and implementation of changes in town centres and in the monitoring of their vitality and viability.
- 2.71 Thus, RPBs are required to:
- i) set a vision and strategy for the region's growth and a strategic framework for planning at the local level;
 - ii) develop a strategic framework for the development of a network of centres;
 - iii) make strategic choices about those centres of regional and sub-regional significance where major growth is to be encouraged;
 - iv) identify the need for new higher order centres;
 - v) assess the need for additional floorspace in the comparison retail, leisure and office sectors;
 - vi) identify where needs would best be met having regard to capacity and accessibility considerations; and
 - vii) identify the need for major town centre development of regional or sub-regional significance.
- 2.72 In turn RPBs and LPAs are required to consider:
- i) whether there is a need to avoid an over-concentration of growth in the higher level centres;
 - ii) the need for investment in those centres requiring to be regenerated; and
 - iii) the need to address deficiencies in the network.
- 2.73 In preparing their development plan documents within the context set by the RSS, LPAs, in turn, must:
- i) select appropriate existing centres to accommodate growth, making the best use of existing land and buildings, but extending the centres where appropriate using

tools such as the Action Plans, CPOs and strategies to address transport, land assembly, crime prevention and enhanced design;

- ii) manage the role of existing centres through the promotion of specialist activities, or specific types of uses; and
 - iii) plan for new centres of an appropriate scale in areas of growth, or where there are deficiencies in the existing network.
- 2.74 Where growth cannot be accommodated within existing centres, LPAs are to plan for the extension of the primary shopping area, if there is a need for retail provision, and for the extension of the town centre as a whole to accommodate other main town centre uses.
- 2.75 The key considerations to apply in selecting sites for development remain similar to those identified in PPG6 and subsequent ministerial statements. However, there is more emphasis given to the issue of scale, so that LPAs are to consider setting indicative upper limits for the scale of development likely to be permissible in different types of centres.
- 2.76 Strong emphasis continues to be given to the sequential approach, but it does not appear that the Government is seeking to impose a moratorium against out-of-centre development, albeit that such development will be rare. If there is a need for larger stores, and they cannot be accommodated within the existing primary shopping area, they are to be directed to edge-of-centre locations. The guidance is unclear as to whether an individual retailer or leisure operator faces the test of disaggregation (paragraph 3.18), but all parties must demonstrate flexibility in relation to scale, format, design and the amount of car parking in seeking to promote development within existing centres.
- 2.77 We consider, however, that the new guidance is not particularly informative for LPAs that have town centres which face significant physical and environmental constraints to their expansion, such as spa towns, cathedral cities and so on. Nor is the policy statement of much assistance in helping RPBs and LPAs to choose between competing uses where the needs in the retail, leisure, office and cultural sectors are projected to substantially exceed the ability of existing centres - or indeed expanded centres - to accommodate them.
- 2.78 Finally, we consider that the guidance given in the new PPS6 in relation to the creation of new centres is totally inadequate. How are such new centres to become 'town centres' for the purpose of the Annex A typologies; how are RPBs and LPAs to benefit from the negative experience of some of the new towns; and how is the scale of such new centres to be determined?

3 THE REGIONAL AND LOCAL PLANNING POLICY CONTEXTS

Regional Planning Policy

Regional Planning Guidance for East Anglia to 2016 (RPG6, November 2000)

- 3.1 Regional Planning Guidance Note 6 (RPG6) for East Anglia³ was published in November 2000. RPG6 is based on the Regional Strategy for East Anglia (1995-2016) which was published as Draft RPG. RPG6 prescribes a development strategy to 2016, and 'sets the framework for the longer term future'. RPG6 is currently under review and a draft Regional Spatial Strategy (RSS) - the East of England Plan - was published in December 2004 (this is in turn reviewed below).
- 3.2 The overall 'Vision for East Anglia' as outlined in RPG6 is one of *'development set within a sustainable development framework'* and where:
- 'Economic opportunities are maintained and improved;
 - There is increasing social equity for all areas;
 - The environment is protected and enhanced while the distinctiveness of each locality is maintained; and
 - Natural resources are conserved'
- 3.3 Three *'strategic aims'* and 16 *'objectives'* are identified by RPG6. Those most relevant to the Fenland District Retail Study are:
- **Priority areas for regeneration** - *'to reduce disparities in social and economic opportunities and quality of life by investing in areas of disadvantage and encouraging employment opportunities in the region';*
 - **Employment** - *'to maintain and enhance the region's economy and competitiveness, to increase employment, and to promote a closer relationship between homes and jobs';*
 - **Access to facilities** - *'to locate new development to maximise access to facilities in town and city centres';*
 - **Development of built up areas and derelict land** - *'to make the most beneficial use of built up areas, particularly derelict or previously developed areas'.*
- 3.4 *'Moving towards sustainable development'* is one of the *'Key Strategic Issues'* within the RPG's Development Strategy; it is commented that much of the recent development in East Anglia has been poorly located in relation to employment and services; and has made inefficient use of land, which has therefore resulted in more construction on previously developed land. These existing trends 'will need to be modified' in order for development to be undertaken sustainably. Whilst the main urban centres will play a *'major role'* in accommodating growth, it is also noted that *'the market towns across East Anglia have a key role in providing a range of services and employment opportunities for their surrounding areas. Further enhancement of, and development within, them will be important in making good the continuing loss of employment in agriculture, meeting housing needs, and minimising the development of previously undeveloped land.'*

³ *'East Anglia'* refers in RPG6 to the counties of Cambridgeshire (including Peterborough Unitary Authority), Norfolk and Suffolk. The East of England became the planning region from April 2001.

- 3.5 Furthermore, the enhancement of urban areas is regarded as central to the strategy of the RPG, *'so as to provide attractive places in which to live and work with a strong emphasis on the quality of design and quality of life and on tackling their economic, environmental, social and transport problems'*. An emphasis on reducing vacancy rates and a more intensive and efficient use of land is seen as important in making effective use of capacity and enhancing urban quality.
- 3.6 The larger cities and towns in East Anglia⁴ are identified as being the focus for new residential development, followed by *'other towns where development would contribute to greater self containment in demand for travel'*, then *'towns with good public transport accessibility provided that growth in car-commuting can be minimised'*, and, exceptionally, small scale development in villages. Housing development in the Cambridge sub-region (which includes Chatteris⁵) is discussed separately in RPG6, with the built up area of Cambridge the preferable location for development, followed by: the periphery of Cambridge; a new settlement close to Cambridge; within the built up area of market towns, larger villages, and previously established new settlements with good public transport access; and finally by extensions to such settlements. RPG6 states that provision should be made for a total net increase of 9,900 dwellings per annum across East Anglia, including 4,000 per annum in Cambridgeshire⁶.
- 3.7 *'Towns and Local Centres and Retail Development'* is a further *'Key Strategic Issue'* discussed by RPG6, and it is stated that existing towns and city centres should remain the focus of social and economic life, and also be the preferred location for developments attracting large numbers of people. Efforts should be made to increase the attractiveness of the region's towns and cities, through methods such as pedestrian priority and town conservation. RPG6 follows national planning policy guidance and affirms a sequential approach to retail and leisure proposals. No need for an additional regional shopping centre over the plan period is identified. Policy 13 states that *'Development plans and local transport plans should include policies to promote and enhance the vitality and attractiveness of city, town and local centres'*, through a number of means, including providing for uses which attract large numbers of people; an emphasis on mixed use development and increased housing; and enhancement of the attractiveness of centres.
- 3.8 Wisbech is one of eight areas in the region identified as a *'Priority Area for Regeneration'*. RPG6 notes that *'Development plans should include policies consistent with the sustainable development principles...to promote the regeneration, economic enhancement and environmental protection and enhancement of the Priority Areas for Regeneration'*. Such policies should seek to, amongst other objectives, *'protect and enhance their entertainment and retail facilities'*.
- East of England Plan - Draft Revision to the Retail Spatial Strategy for the East of England (December 2004)*
- 3.9 The East of England Plan - the draft Regional Spatial Strategy (RSS) for the East of England - was published in December 2004 and provides a broad development strategy for the Region up to 2021. Upon completion, it will act as a statutory framework, within which local authorities will produce their own more detailed development plans. The overall spatial planning vision for the East of England is *'to sustain and improve the quality of life for all people who live in, work in, or visit the region, by developing a more sustainable, prosperous and outward-looking region, while respecting its diversity and enhancing its assets'*. From this Vision stem 14

⁴ Identified as Bury-St-Edmunds, Ipswich, King's Lynn, Norwich and Peterborough. Housing growth in Cambridge is covered by a separate policy.

⁵ The Cambridge sub-region comprises Cambridge, St Neots, Huntingdon, Chatteris, Ely, Newmarket, Haverhill (East of England planning region) and Royston and Saffron Walden (South East planning region).

⁶ This figure includes 2,800 in the part of Cambridgeshire within the Cambridge sub-region, and 1,200 in the rest of the county. RPG6 states that this represents a 'significant shift from the existing pattern within the county'.

policy objectives. The objectives of most relevance to the Fenland District Retail Study are:

- *'increase prosperity and employment growth to meet identified employment needs of the region, and achieve a more sustainable balance between workers and jobs;*
- *improve social inclusion and access to employment and services and leisure and tourist facilities among those who are disadvantaged;*
- *increase the regeneration and renewal of disadvantaged areas;*
- *sustain and enhance the vitality and viability of town centres;*
- *make more use of previously developed land and existing buildings, and use land more efficiently, in meeting future development needs; and*
- *protect and enhance the built and historic environment and encourage good quality design and use of sustainable construction methods for all new development'.*

3.10 The achievement of sustainable development is identified as the *'starting point'* for the draft RSS, with Policy SS1 advising that a sequential approach to the location of major development is a *'core component'* of sustainable development. The Policy also states that in most instances development will be focused in, or adjacent to, major urban areas with good public transport accessibility and connection of strategic networks. In more rural areas, *'development will be focused on market towns which have good public transport accessibility to key urban areas'*. As such, the realisation of this strategy will have, as one of its spatial implications, *'maintaining the vitality and viability of market towns as focal points for access to employment, services and facilities for their surrounding rural areas, and as focal points for affordable housing'*.

3.11 Policy SS2 details key centres on which development and change will be focussed. None of the Fenland market towns are identified as such; those which are identified include Peterborough, Cambridge and King's Lynn. Development in rural areas is covered by Policy SS9, which states that development will be concentrated in market towns, and thereafter in key service centres. Policy SS9 then lists a number of considerations which local authorities will need to make in order to *'sustain the viability and secure revitalisation'* of the market towns in the region, including:

- *'accommodate additional housing, employment growth and economic diversification;*
- *enhance the environment of the town centre;*
- *improve the accessibility of the town by public transport from surrounding rural areas; and*
- *extend provision for shopping facilities and services in the town centre'.*

3.12 The role of market towns and larger villages in providing services and employment to a rural hinterland is acknowledged. The regeneration of market towns can help to secure a *'positive change'* in rural areas.

3.13 As well as outlining region-wide priorities, the draft RSS also contains more detailed policies in respect of the region's sub-areas, of which a total of 14 are identified. Wisbech and March fall within *the 'Greater Peterborough Sub-Area'*.

3.14 Policy GPSR1 presents the strategy for the Greater Peterborough sub-region, which advises that policies should be developed and implemented to *'consolidate the market towns of Wisbech and March as important centres of employment, services and facilities and the focus for economic regeneration within the rural area of north Cambridgeshire'*. Both towns have capacity for further growth, but *'this needs to be accompanied by job growth to maintain a sustainable balance between homes and jobs'*. Small to medium scale employment opportunities should be developed in Whittlesey and Ramsey, together with limited, small scale new housing development

'appropriate to their roles as a focus for the rural hinterland'. It is commented that the sub-region still has a strong representation from *'traditional'* industrial sectors but is failing to meet its potential for developing knowledge-based industries.

- 3.15 The draft RSS references the Peterborough sub-regional study, which identified that the sub-region has the potential to accommodate *'considerable'* housing growth; and the Peterborough Growth Area Study (2004), which found *'significant capacity'* for development focussed on the city of Peterborough, although it is recognised that intervention will be required to deliver this. Some 21,200 net additional dwellings and 17,400 net additional jobs are allocated to the Peterborough Unitary Authority area between 2001 and 2021 (Policy GPSR3).
- 3.16 The Examination in Public Panel Report on the draft East of England Plan, published in June 2006, recommended⁷ an increase to the number of net additional dwellings allocated to the Peterborough Unitary Authority Area from 21,200 to 25,500, whilst the number of net additional jobs was recommended to be increased from 17,400 to 'at least' 20,000.
- 3.17 Policy H1 of the draft RSS allocated 10,100 net additional dwellings to be provided for in Fenland District between 2001 and 2021. The Panel Report also recommended⁸ that this figure be marginally increased to 11,000 dwellings. The Panel Report commented thus: *'It was argued that...March and Wisbech as market towns have further scope for growth, and that small towns such as Whittlesey and Ramsey will suffer economic decline without more development...Given the commercial influence of the market towns, which have extensive catchment areas, we conclude that a modest increase to 11,000 dwellings for Fenland would be appropriate.'*
- 3.18 Chatteris falls within the Cambridge sub-region, although no specific mention is made to the town in the sub-regional policies.
- 3.19 Regarding retail and town centre development, the draft RSS notes that the East of England is not dominated by major conurbations but has a *'region-wide network of mainly medium and small town centres which are vital elements of the regional economy...They serve not only their immediate urban areas but wider hinterlands'*. Policy SS5 states that *'Thriving, vibrant and attractive town centres are fundamental to the sustainable development of the East of England and they will continue to be the focus for investment, environmental enhancement and regeneration'*. The policy also requires future local development documents to include a strategy for each town centre *'to promote successful mixed use economies, manage change, refocus where necessary and support cultural heritage'*.
- 3.20 The draft RSS also takes a topic-based approach to economic development, retail and tourism. Policy E9 outlines the *'regional structure of retail centres'*, and identifies nine *'major regional centres'* (including Cambridge and Peterborough) as well as 11 *'regional centres'*. Fenland's market towns fall within the third-tier; *'other towns and market towns'*. The draft RSS states that *'Local development documents will define the towns and market towns that comprise the structure of main retail centres within their area'*.
- 3.21 Policy E10 presents the retail strategy, of the draft RSS, which directs new retail development to existing centres, *'consistent in scale with the size and character of the centre and its role in the regional structure'*. The draft RSS also advocates that local development documents should address retail needs and *'present an analysis of their area designed to produce a coherent retail strategy in relation to their existing town centres, edge-of-town centre and out-of-town retail sites, and e-tailing growth'*.

⁷ East of England Panel Report, Recommendation R5.8

⁸ *ibid*

Sub-Regional and Local Planning Policy

Cambridgeshire and Peterborough Structure Plan (2003)

- 3.22 The Cambridgeshire and Peterborough Structure Plan (SP) was adopted in December 2003, and provides the current framework for development in Cambridgeshire, including Fenland. The SP contains two specific strategies, for the Cambridge sub-region, and Peterborough and North Cambridgeshire. Chatteris falls within the Cambridge sub-region, and Wisbech, March and Whittlesey (as well as Ramsey) are the principle market towns within Peterborough and North Cambridgeshire.
- 3.23 Cambridge and Peterborough are identified as sub-regional centres by the SP, with the widest range of higher order services and facilities. The market towns function as more locally orientated area centres, and each has its own identity and offers a different range of services.
- 3.24 The SP echoes national policy in the promotion of a sequential approach to retail development, placing the emphasis on city/town centre locations in preference to out-of-centre locations. Policy P3/1 advocates the development and implementation of 'City and Town Centre Strategies', which will (inter alia): support city and town centres as the primary locations for shopping, employment and leisure uses; encourage mixed-use development, including housing; and encourage high-quality development which respects the centres' existing heritage.
- 3.25 Uses which attract large numbers of people should ideally be focussed in existing city and town centres (Policy 3/2). Proposals should be accessible by a range of transport modes (particularly public transport); be of appropriate scale; and address an identified need in the plan area. Market towns (and district centres) *'serve a local catchment area and should therefore continue to be the focus for everyday needs such as convenience shopping, banking, and leisure facilities'*.
- 3.26 Reflecting national and regional policy, the SP seeks to direct most new housing development within or adjoining the principle urban areas. Policy P5/1 states that provision will be made for 70,200 additional homes throughout Cambridgeshire and Peterborough between 1999 and 2016. This will be distributed throughout the region, the largest provision of additional homes being in South Cambridgeshire (20,000). Policy P5/2 will need to be made for 8,100 additional homes in Fenland District.
- 3.27 Notable urban expansion within the sub-region (but outside of Fenland District's boundaries) will take place on the edge of Peterborough at Hampton (*'one of the largest private sector brownfield developments in Europe'*), which currently provides for 5,200 new dwellings, and a potential further housing capacity of 2,000 dwellings (Policy P10/5). The nearest of the Fenland's four market towns to this expansion area is Whittlesey.
- 3.28 The Cambridge Sub-Region contains Cambridge and a ring of surrounding market towns⁹. Chatteris is the only one of the four Fenland market towns to be included in this sub-region. The Vision for the Sub-Region notes that the knowledge-based economy will continue to expand, whilst the character and setting of Cambridge and the Market Towns is protected and enhanced; and that Cambridge and the Market Towns (and one or more new settlements) will be the focus for *'sustainable and spatially concentrated patterns of high quality, socially inclusive development'*.
- 3.29 Chatteris is the subject of a separate policy (P9/5), whereby the town will be *'given priority for economic regeneration in the Cambridge Sub-Region and further housing allocations will be dependent on improving job prospects'*. The town has a 'relatively weak economy' and will be the focus for measures to improve economic prosperity and accommodate any jobs relocated from Cambridge.

⁹ The other market towns in this Sub-Region (outside of Fenland District) are Ely, Newmarket, Haverhill, Saffron Walden, Royston, St Neots, Huntingdon and St Ives.

- 3.30 Provision is made for 1,500 additional homes in the part of Fenland that falls within the Cambridge Sub-Region, in *'Market Towns, Previously Established New Settlements, Rural Centres and development already committed elsewhere in the Sub-Region'*.
- 3.31 Wisbech, March and Whittlesey fall under the SP's *'Strategy for Peterborough and North Cambridgeshire'*; the market towns¹⁰ *'are the focus for the economic and social life throughout much of the area outside Peterborough'*. The decline which has been suffered in the market towns through the decline of traditional industry and agriculture is noted, but the towns can *'provide a focus in the future for sustainable development and regeneration'*. The Vision for Peterborough and North Cambridgeshire supports the market towns, in particular Wisbech and March, as development locations and sustainable economic and social centres. Wisbech and March are both identified as *'priority areas for economic and social regeneration'*
- 3.32 The SP states that housing development will be concentrated in Wisbech and March, with Whittlesey identified as suitable for limited/small-scale housing development. SP Policy P10/1 states that provision should be made for 6,600 additional homes in the area of Fenland District falling within the Peterborough and North Cambridgeshire sub-area.

Cambridgeshire County Council - Cambridgeshire Retail Development Report (November 2005)

- 3.33 Cambridgeshire County Council published the Cambridgeshire Retail Development Report in November 2005; it provides details of shopping floorspace lost and gained between 1999 and 2005 for each of the districts in Cambridgeshire, including Fenland, together with reporting on proposed developments as at 31 March 2005. As well as providing a general overview in terms of floorspace losses and gains, the report also outlines site by site information for each planning permission granted, including the location of the development and its floorspace.
- 3.34 A1 retail floorspace across Fenland district increased slightly from 116,000 sq.m to 120,000 sq.m between 2000 and 2004. Total completions for 1999-2005 were 11,996 sq.m of floorspace¹¹, the vast majority of which took place in the market towns, including a significant amount at the Belgrave Retail Park in Wisbech. Town centre development in Fenland has been *'very insignificant'*, with just 322 sq.m new floorspace, and a loss of 1,078 sq.m over the same period. More edge-of-centre development has taken place, but the most significant growth has been in out-of-centre locations.
- 3.35 The report also outlines outstanding commitments in the district at 31 March 2005. Fenland had a total of 5,921 sq.m new commitments (including 3,401 sq.m planning permissions and 2,520 sq.m allocations), and losses of 1,102 sq.m. The largest individual developments listed in the report are Belgrave Retail Park (1,236 sq.m), together with three non-food retail units in March (900 sq.m), and a change of use to retail in Chatteris (864 sq.m). A further 2,520 sq.m of allocated floorspace in March High Street has planning permission for residential development. Some 60 per cent of outstanding commitments for new retail floorspace is in town centre locations.

Fenland District Council - Fenland District Wide Local Plan (August 1993)

- 3.36 Fenland's District Wide Local Plan was adopted in 1993 (with limited alterations in 2001, as discussed below), and remains part of the statutory development plan until the Local Development Framework is adopted. The Local Plan is split into two parts, with the first setting out the general district-wide policies and proposals, and the

¹⁰ Ramsey (outside of Fenland District) is also identified as a market town in the Strategy for Peterborough and North Cambridgeshire

¹¹ Losses over the period were 1,637 sq.m, resulting in a total net change of 10,359 sq.m.

second containing detailed policies for the settlements in the District. All four of the market towns are addressed separately.

- 3.37 Wisbech and March fulfil roles as 'major local centres', with a 'relatively extensive sphere of influence'; Chatteris and Whittlesey serve a more local function. Peterborough and Cambridge are identified as the centres at the top of the retail hierarchy in the sub-region. The vulnerability of Fenland's towns to major new food superstores in adjacent districts is noted.
- 3.38 The trend towards large scale retail developments in locations outside of the town centres is identified as one of the 'Problems and Issues', and, *'if unrestricted, could threaten the vitality and viability of existing town centres unless, as at Wisbech, vigorous efforts are made to balance the provision of out-of-centre shopping with attractive town shopping areas'*.
- 3.39 As an element of the Strategic Framework, the Structure Plan seeks to maintain and sustain the central areas of the market towns and smaller towns as 'daily shopping centres for their spheres of influence', and *'strategic policies generally aim to restrict out-of-town retailing and to protect the character of historic market towns from inappropriate developments'*.
- 3.40 The Local Plan lists as the main objectives of its retail policies:
- *'to maintain, and wherever possible, enhance present levels of retail provision within existing settlements;*
 - *to enhance the viability and vitality of the existing town centre shopping areas of Chatteris, March, Whittlesey and Wisbech;*
 - *to control the introduction of non-retail uses within town centres to maintain their primary retail function;*
 - *to restrict edge-of-town and out-of-town retailing to that which would not adversely affect the vitality and viability of the town centres; and*
 - *to protect the character of the historic town centres from inappropriate development'*.
- 3.41 Part 2 of the Fenland Local Plan considers the 'Settlement Policies and Proposals', and these are reviewed in turn for each of the four market towns, below.
- Wisbech*
- 3.42 Wisbech is the largest town in the District, located on the River Nene, and a well established market town and port, with port facilities remaining on the river. Large parts of the town centre were designated as a conservation area in 1972, which was extended in 1979. It is the third largest shopping centre in the County (after Peterborough and Cambridge), with a substantial catchment area extending as far afield as parts of Lincolnshire and Norfolk. The town originally had two market places; the second of which remains the major centre for retailing in the town, together with the retention of a traditional *'market'* influence.
- 3.43 The Development Strategy for Wisbech places high priority on conservation and environmental enhancement of the town. The Proposals Map defines the central commercial area, and the adopted Local Plan states that no major proposals are necessary, and that the future strategy will be one of consolidation.
- March*
- 3.44 March is the second largest town in the District after Wisbech, occupying a central location in the District and well connected in terms of road and rail links. The town has developed into a 'thriving commercial centre', having initially developed around the railways. The River Nene cuts through the centre of the town, with the bridge across

the river being one of the town's key features. Commercial uses are focused to the north of the river.

- 3.45 The Local Plan states that March is one of the main weekly shopping centres in the District, serving a significant rural hinterland. Convenience goods form the majority of the shopping offer with some comparison goods retail also present.
- 3.46 As with Wisbech, much of the town centre is part of a conservation area, which extends from Market Place to St Peter's Church, and also includes parts of the River Nene frontage. The Local Plan proposes the expansion of the conservation area along West End.
- 3.47 The Development Strategy allocated two sites for additional retail development in the town centre: the Millview site (for which planning permission existed for retail and residential development), and High Street, south of St Peter's Church, which the Local Plan envisages could be redeveloped in conjunction with the adjacent DIY store site.

Whittlesey

- 3.48 Whittlesey lies within the western part of Fenland District in close proximity to Peterborough, which is five miles away. The historic core of the town was designated a conservation area in 1972, the boundary of which was extended a decade later. Residential growth has taken place to the north, east and west of the historic core, and industrial growth has been concentrated to the south east, although this area suffers from poor access.
- 3.49 The Local Plan describes Whittlesey's function as a district centre, *'dealing primarily in food and other convenience goods with some limited comparison shopping'*. The comparison shopping is mostly located at the out-of-centre Station Road Industrial Estate which contains a number of retail warehouses.
- 3.50 The Local Plan notes that in the town centre, *'retailing, car parking and environmental improvements will need to be the subject of further study'*. The Proposals Map defines the Central Commercial Area; no allocations for retail development are made.

Chatteris

- 3.51 Chatteris lies within the southern part of the District, seven miles to the south of March. As with Whittlesey, the town functions as a district centre, and as such provides mainly for day to day shopping needs.
- 3.52 The shopping area comprises High Street, Market Hill, Park Street, and part of West Park Street. The High Street/Market Hill/Park Street area forms the Chatteris Conservation Area, which was designated in 1975, and then expanded in 1979.
- 3.53 Approval was given prior to the publication of the Local Plan for new retail development at the corner of High Street and New Road. The Development Strategy for the town states: *'The western side of the High Street has considerable potential for the creation of a shopping mews, linking through to Railway Lane'*.

Fenland District Council - Fenland District-Wide Local Plan Interim Statement of Proposed Changes (SPG, January 2001)

- 3.54 Fenland District Council published an 'Interim Statement of Proposed Changes' (ISPC) in January 2001 to act as Supplementary Planning Guidance for development control purposes. The production of the draft Alterations to the Local Plan was delayed by further consideration needing to be given to *'certain problematic policy areas and certain housing allocations in relation to Planning Policy Guidance 3'*, and further by the publication of the revised PPG3 which *'brought into question the whole approach to the current Local Plan Review to 2006'*. The Council considered that a review of existing housing allocations could only be undertaken as part of a Replacement Local Plan; hence the existing review was brought to a conclusion in 2000, and the ISPC was approved as SPG.

- 3.55 Local Plan Policy S2 ('Retail Developments - Existing Centres') was amended to take account of the sequential approach to site selection required by PPG6. The amended Policy S2 states: *'Major convenience shopping developments will be expected to locate within central commercial areas...if no suitable sites are available within the central commercial area, then sites adjoining this area should be considered, and only then should out of town locations be considered'*.
- 3.56 The ISPC also amended Primary Shopping Frontages (PSF), allocating an additional PSF in Chatteris (Park Street), and deleting a number of PSFs in Wisbech (parts of Bridge Street, High Street, Nene Quay, York Road and Union Street). The deletions in Wisbech reflect the *'shifting focus of the main shopping streets and to encourage a diversity of uses in the secondary areas where a higher level of vacancies exist'*.

Fenland District Council - Local Development Scheme (March 2006)

- 3.57 Under the terms of the Planning and Compulsory Purchase Act 2004, Local Development Plans and Unitary Development Plans are to be replaced by Local Development Documents (LDDs) set within Local Development Frameworks (LDFs).
- 3.58 Fenland District Council has recently published its revised Local Development Scheme (LDS), which outlines the form the Fenland LDF will take and the timeline for its production. The LDS notes that the existing Structure and Local Plans will automatically be *'saved'* during the period of transition to the new system of LDFs, and until the new series of LDDs have been prepared and adopted by the Council.
- 3.59 The principle document in the new LDF will be the Core Strategy, which will *'explain the Council's vision for the future of Fenland and set out the spatial strategy and key development objectives for the area'*. The Core Strategy is still at a relatively early stage of its preparation, and has recently been out to consultation in 'Issues and Options' form. This is reviewed below.
- 3.60 The LDF will also contain a 'Site Specific Proposals and Policies' Development Plan Document (DPD), which is due to go to consultation at the 'Issues and Options' stage in November/December 2006.

Fenland District Council - Local Development Framework: Issues and Options Consultation Paper (January 2006)

- 3.61 The Issues and Options Consultation Paper (I&O paper), frames broad spatial development questions for local debate and discussion. A series of 15 Issues are presented, including the District's Retail Strategy.
- 3.62 Fenland District lies within an area of significant pressure for growth, due to its location on the northern reach of the London Stansted, Cambridge and Peterborough growth area, and the district is set to grow at similar rates to past growth levels. The need to balance between planning for the future (through the provision of new homes, employment, and community facilities) and the protection and improvement of the environment is identified.
- 3.63 The I&O paper identifies that 10,100 new dwellings will need to be constructed in Fenland between 2001 and 2021¹², as set out in the Draft RSS for the East of England. As outlined in the Structure Plan, the majority of the housing will be located within or adjoining Wisbech, March and Chatteris, and to a lesser extent Whittlesey, which is identified as having a 'severe imbalance' between employment and housing, and where infrastructure improvements will need to take place before major housing development can occur.
- 3.64 Three options are presented, reflecting the distribution of the new housing to each of the market towns: Option 1 giving the largest allocation to March (1,200 homes), Option 2 splitting the largest allocation between Wisbech and March (1,000 homes

¹² Of these, 1,960 were constructed 2001-04, hence a residual requirement exists for 8,140 dwellings 2004-21

each), and Option 3 allocating 1,200 homes to Wisbech. The I&O paper invites comments on whether a strategy focusing on the three towns and limiting growth in Whittlesey is appropriate, and which areas of search should be allocated for housing.

- 3.65 In relation to retail, the four market towns provide a wide range of shopping, leisure and social facilities, and so they should be the focus for new retail development. Nevertheless, the I&O paper states that there is no over-riding need for additional convenience retail provision in the towns, but that there is scope for some additional comparison retail floorspace. This reflects the findings of the CB Hillier Parker Retail Study (reviewed below).
- 3.66 In recent years vacant shops have often been converted into take-away and restaurant uses, and the I&O paper identifies the potential for a continuation of this trend to undermine the attractiveness of the market towns. It is questioned whether if this trend continues, the attractiveness of the market towns will suffer, and the Issues and Options paper invites responses to this specific issue. There is also a need to consider the impact of large, out-of-centre markets on the retail offer and usage of the town centres.

Fenland District Council - Central Commercial Area Survey (February 2002)

- 3.67 Vacancy rates are noted to have decreased in Chatteris and March to '*levels that are consistent with organic change and turnover within the towns*'; however the vacancy rates in Wisbech and Whittlesey have remained '*relatively static but at levels that are still cause for concern*'.
- 3.68 The Survey also identifies a decrease in the number of A1 use class units in each of the four centres, with the greatest change occurring in March (in particular) and Whittlesey: '*much of this change is accounted for as a result of an increase in the number of units in Use Class A3 and other non-retail related uses*'.

Fenland Strategic Partnership - Fenland Community Strategy (March 2004)

- 3.69 In 2003 the Strategic Partnership undertook a consultation exercise asking for views on the 'big issues' for Fenland; 'Access and Transport' and 'Economic Development' were the most important issues identified by consultees; more specifically, lack of public transport linking market towns, and the need to revitalise market towns, were both identified as important.
- 3.70 A '*20 year vision*' for market towns is identified: '*Market town facilities are improved to provide a greater range of shops, cafes, restaurants and vibrant town centres*' and '*Good public and community transport networks exist which are user friendly, well advertised and supported by the community*'. One of the Strategy's identified aims is 'Building vibrant town and village communities that are good to live in'. Objectives of this aim include improving the vitality of market town centres through schemes to reduce the number of redundant buildings, and expand the range of specialist shops, restaurants, quality retail, recreation and visitor facilities; and to facilitate the development of vibrant towns and district centres.

CB Hillier Parker - Cambridgeshire & Peterborough Structure Plan Review Retail Study (July 2001)

- 3.71 All four of Fenland's market towns were reviewed as part of the Retail Study that was produced by CB Hillier Parker (CBHP) on behalf of Cambridgeshire County Council, Peterborough City Council and Cambridge City Council in July 2001. The study was produced to inform the review of the Cambridgeshire and Peterborough Structure Plan Review, and the Cambridge City Local Plan Review. The study identified the baseline position of the centres, and presented possible alternative scenarios for future development within the sub-region.
- 3.72 Three '*tiers*' of towns within the Structure Plan area were identified; at the highest level are the sub-regional centres of Cambridge and Peterborough (both seen as vital and

viable centres), followed by *'large/medium market towns'*, including Wisbech¹³, and *'small market towns'*, including March, Whittlesey and Chatteris¹⁴. The market towns were noted to be *'generally performing well'*, although Wisbech and March were said to be experiencing *'some difficulties'*. Chatteris and Whittlesey were both considered to be *'relatively stable'*.

- 3.73 All towns (with the possible exception of Wisbech) were seen to be *'trading adequately'* in terms of their comparison goods turnover. Some surplus comparison goods capacity is identified for Wisbech (as well as Huntingdon, Ely and St Neots), but *'the surplus expenditure should be focussed on sustaining and enhancing the existing provision'*. No scope for comparison goods development was identified in any of the 'Small Market Towns'.
- 3.74 With regards to convenience goods turnover, the study states that there is *'unlikely to be any significant strategic convenience goods floorspace capacity in any of the Large/Medium Market Towns over the Structure Plan period'*, with the exception of Ely. There was considered to be an over-supply of convenience goods floorspace in March and St Ives. No surplus capacity was forecast to support new foodstores in Chatteris, Whittlesey or Ramsey.
- 3.75 The study lists retail floorspace in the market town centres; of the four Fenland centres, Wisbech has the highest amount at 25,500 sq.m net, followed by March at 16,500 sq.m net, Whittlesey at 8,000 sq.m net, and Chatteris at 4,000 sq.m net. Out of the nine market towns in the Structure Plan area, Huntingdon has the highest amount of floorspace, at 28,000 sq.m net, followed by Wisbech and St Neots. Wisbech has twice the amount of comparison goods floorspace compared to convenience goods floorspace. Chatteris has the lowest overall amount of all the nine centres.
- 3.76 The study reviews the quantitative capacity for new retail floorspace in the main centres in the sub-area, and presents a baseline projection, together with four alternative scenarios, based on different strategic housing development options as prepared by the County Council. Two of the options present a 'Market Towns focus', with one based on Huntingdon, and the other on St Neots/Haverhill.
- 3.77 The study identifies a slight increase in convenience goods capacity in Wisbech from the baseline to 300 sq.m net - which remains static across all scenarios - and a marginal increase in comparison goods capacity. March is identified as having an oversupply of convenience goods floorspace, and hence the growth options would only serve to reduce this oversupply. Retailer requirements for March could be met through reoccupation of existing units. No significant change is forecast for Whittlesey or Chatteris under any of the growth options.

Town Centre Health Check Studies

Wisbech Regeneration Partnership - Wisbech Healthcheck (June 2002)

- 3.78 The Wisbech Regeneration Partnership's Healthcheck includes a vision to create a *'safe, attractive, and above all, a sustainable market town for the future'*. It identifies 15 objectives, including improving public transport connections and facilities; physical enhancement of run down areas; promotion of shop front improvements; further riverside enhancement; and improved facilities for pedestrians.
- 3.79 A number of 'problems' and 'opportunities' are identified by the Healthcheck, including:
- empty and derelict properties giving the town centre a run down appearance;
 - concern that some areas of the town are uninviting for pedestrians;

¹³ Other 'large/medium market towns' (12-25 multiple retailers) in the Structure Plan area are Huntingdon, Ely and St Neots

¹⁴ Other 'small market towns' (0-11 multiple retailers) in the Structure Plan area are St Ives and Ramsey

- out-of-centre retail developments have adversely affected the vitality and viability of the town centre;
- 3.80 In relation to retail and town centre services, the Healthcheck comments that:
- convenience retailing is concentrated out-of-centre, with the town centre under-represented in terms of convenience retailing;
 - the town is generally dominated by independent retailers in relatively small units, with only a *'small number'* of national multiples;
 - the proportion of vacant retail units is higher than the national average, but is decreasing. Retail floorspace in the town has increased overall through the development of the Horsefair Centre and out-of-centre convenience retail. There has been an associated decrease in the number of small convenience retailers; and the Horsefair Centre resulted in a shift of the retail focus to the northern side of the Market Place. Comparison retail has declined between 1997 and 2001. Rents for retail premises have remained broadly static.
 - the town's Thursday market is 'thriving', but the Saturday market (although larger) is 'declining'. Additionally a large open-air market is held to the south of the town every Sunday, attracting visitors from a wide area.
- 3.81 The study notes that *'Wisbech is still experiencing difficulty in maintaining current retailers and attracting new ones into existing units. The town suffers competition from neighbouring urban centres such as King's Lynn and Peterborough and needs to raise awareness of the range of shops and services available'*.
- March Regeneration Partnership - March Market Town Healthcheck (May 2002)*
- 3.82 The consultations carried out by the Partnership resulted in the identification of 15 'priority action areas', including the need to carry out riverside enhancements and waterways regeneration; to extend car parking provision; and to provide improvements in the appearance of town gateways.
- 3.83 The healthcheck summarised the following in relation to retail and services in March town centre:
- the centre provides a 'good range' of independently owned shops, together with a 'small range' of national multiples, and service sector provision is well catered for;
 - there has been no major loss in retail floorspace in the town centre;
 - trade on both the Council and privately run markets has remained stable;
 - vacancy rates in the town centre decreased between 1997 and 2002, with only one unit remaining vacant throughout the period 1997-2001. Although there have been shop closures, several new shops have opened in their place, together with an increase in service sector provision through the opening of a new hotel, and the provision of cinema facilities at the town's bingo hall. Rents in the town were increasing at a modest level; and
 - the town *'needs to attract more national multiple retailers'*, although there is an *acknowledgement that in reality this might be difficult to achieve.*
- Whittlesey Regeneration Partnership - Whittlesey Healthcheck (June 2002)*
- 3.84 Whittlesey's healthcheck summary notes a number of 'problems' including: the empty and derelict properties in the town centre; poor public transport linkages and co-ordination; the need for better marketing of the town to promote its heritage and specialist retailers; and commuting to Peterborough which results in the town acting as a dormitory location, rather than an independent town.

- 3.85 Enhancement of the town's Market Place was completed in 1999; however the study notes that, although the scheme has been well received, there has been a downturn in profits for market traders. The Healthcheck also highlights that the town has a number of convenience facilities, with Somerfield in the town centre forming the anchor foodstore, although many residents shop at the large Tesco store on the outskirts of Peterborough at Hampton. There are a range of service facilities and a 'large number' of specialist shops which '*continue to attract people from a wide area*'. However, the town's weekly market was identified as struggling.

Chatteris Regeneration - Chatteris Healthcheck (April 2002)

- 3.86 The run-down appearance of buildings in the town - particularly in the town centre, and from the town's northern gateway - is identified as a key shortcoming in Chatteris. However, the Healthcheck acknowledges the District Council's streetscape enhancement scheme, which had been commenced at the time of the study. .
- 3.87 The '*predominance of independent convenience and comparison shopping*' is a 'key feature' of Chatteris, with just two national retailers in the town - Lloyds Chemists and Somerfield. The town has a small local market but faces competition from markets in March and Ely. Furthermore, the Healthcheck states that profit margins for retailers in Chatteris are very low because of the town's peripheral location, and the presence of large competing centres nearby.

4 REVIEW OF KEY RETAIL AND LEISURE MARKET TRENDS

Introduction

- 4.1 In this section, we outline the key national trends in various sub-sectors of the retail and leisure markets, highlighting, wherever appropriate, those that we consider could have - or are already having - an impact in Fenland District. This review is drawn from a range of published data sources, including research by Verdict, the New Economics Foundation, CB Richard Ellis and Colliers CRE. The sector commentaries are prefaced by a résumé of overarching national trends in expenditure and sales.

Retail Sector

National Trends in Expenditure

- 4.2 Table 4.1 reports the short-term past trend in volume of retail sales (i.e. real change in constant prices) since 1996. Non-food retailers in general have secured significantly higher growth in their volume of sales than food retailers (+57.7 per cent versus +30.4 per cent). The growth in volume of sales has been highest amongst retailers of household goods (+85.0 per cent), followed by textiles, clothing and footwear outlets (+66.7 per cent).

Table 4.1 Volume of Retail Sales in Great Britain at 2000 Prices (2000 = 100)

| | All Retailers | Food Retailers | Non-Specialised Stores (Non-Food) | Textiles/Clothing/Footwear | Household Goods | Other Non-Food Retailers | All Non-Food |
|------------------------------|---------------|----------------|-----------------------------------|----------------------------|-----------------|--------------------------|--------------|
| 1996 | 85.4 | 89.3 | 86.9 | 82.7 | 73.2 | 86.9 | 82.1 |
| 2000 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |
| 2001 | 106.1 | 104.1 | 105.9 | 109.4 | 110.9 | 104.6 | 107.7 |
| 2002 | 112.7 | 108.1 | 110.8 | 120.9 | 120.8 | 112.1 | 116.5 |
| 2003 | 116.4 | 111.9 | 113.6 | 128.7 | 127.7 | 114.3 | 121.2 |
| 2004 | 123.3 | 116.4 | 117.3 | 137.9 | 135.4 | 124.3 | 129.5 |
| % Change 1996 to 2004 | 44.4 | 30.4 | 35.0 | 66.7 | 85.0 | 43.0 | 57.7 |

Source: *Retail Sales*, ONS Economic Trends (February 2005), Table 5.8

- 4.3 Figure 4.1, which is reproduced from MapInfo's Information Brief 05/02, presents an analysis of per capita retail expenditure over a longer period, from 1980 to 2004. The data reveal consistently higher rates of expenditure growth on comparison goods - for which the average real growth rate since 1984 has been 5.2 per cent, per capita, per annum - than for convenience goods - for which the average growth rate since 1984 has been a mere 0.5 per cent, per capita, per annum. Although there has been some cyclical variation in the comparison goods expenditure growth rate, the general trend has been upwards, with the growth rate exceeding 5 per cent in every year from 1997 to 2004. Moreover, although the overall volume of non-food retail sales in Great Britain has slowed to just 0.6 per cent from June 2004 to June 2005¹⁵, the latest forecasts from Experian Business Strategies¹⁶ and Oxford Economic Forecasting¹⁷ suggest comparison goods expenditure growth rates of 3.7 per cent, per capita, per annum,

¹⁵ ONS, Economic Trends, August 2005 - Retail Sales, Table 5.8

¹⁶ Retail Planner Briefing Note 2.0, Experian, August 2004

¹⁷ MapInfo Information Brief 05/02, September 2005

and 4.3 per cent, per capita, per annum respectively - the latter being used in our forecasts of future retail need, as detailed in Section 7 of this report.

Figure 4.1 Long-term Per Capita Retail Expenditure Trends

Table 1: UK annual average consumer retail expenditure by goods type (2002 prices)

| | Expenditure per capita (£) (percentage change from the previous year) | | | Price Indices (2002=100) | | |
|---|--|------------------|-----------|--------------------------|------------------|-----------|
| | Convenience Goods | Comparison Goods | All Goods | Convenience Goods | Comparison Goods | All Goods |
| 1980 | 1,421 | 853 | 2,274 | 40.0 | 59.8 | 47.5 |
| | -1.0% | -3.5% | -2.0% | | | |
| 1981 | 1,391 | 846 | 2,237 | 44.2 | 63.7 | 51.6 |
| | -2.2% | -0.8% | -1.6% | | | |
| 1982 | 1,359 | 863 | 2,222 | 48.2 | 67.4 | 55.7 |
| | -2.3% | 2.0% | -0.7% | | | |
| 1983 | 1,368 | 908 | 2,275 | 50.9 | 71.1 | 58.9 |
| | 0.6% | 5.2% | 2.4% | | | |
| 1984 | 1,350 | 947 | 2,297 | 54.3 | 74.1 | 62.4 |
| | -1.3% | 4.4% | 1.0% | | | |
| 1985 | 1,355 | 999 | 2,355 | 57.0 | 78.0 | 65.9 |
| | 0.4% | 5.5% | 2.5% | | | |
| 1986 | 1,380 | 1,084 | 2,464 | 59.5 | 80.4 | 68.7 |
| | 1.8% | 8.5% | 4.6% | | | |
| 1987 | 1,403 | 1,160 | 2,563 | 61.6 | 83.1 | 71.3 |
| | 1.7% | 6.9% | 4.0% | | | |
| 1988 | 1,422 | 1,251 | 2,673 | 64.1 | 86.0 | 74.3 |
| | 1.4% | 7.9% | 4.3% | | | |
| 1989 | 1,440 | 1,283 | 2,723 | 67.5 | 89.8 | 78.0 |
| | 1.3% | 2.6% | 1.9% | | | |
| 1990 | 1,436 | 1,298 | 2,734 | 72.8 | 94.2 | 83.0 |
| | -0.3% | 1.1% | 0.4% | | | |
| 1991 | 1,416 | 1,298 | 2,714 | 78.1 | 99.3 | 88.3 |
| | -1.4% | 0.0% | -0.8% | | | |
| 1992 | 1,407 | 1,347 | 2,754 | 80.9 | 101.4 | 90.9 |
| | -0.7% | 3.8% | 1.5% | | | |
| 1993 | 1,415 | 1,401 | 2,816 | 83.1 | 102.5 | 92.8 |
| | 0.6% | 4.0% | 2.3% | | | |
| 1994 | 1,421 | 1,499 | 2,921 | 84.2 | 102.0 | 93.4 |
| | 0.5% | 7.0% | 3.7% | | | |
| 1995 | 1,405 | 1,546 | 2,952 | 87.6 | 104.8 | 96.6 |
| | -1.1% | 3.1% | 1.1% | | | |
| 1996 | 1,440 | 1,621 | 3,060 | 90.8 | 107.1 | 99.5 |
| | 2.5% | 4.8% | 3.7% | | | |
| 1997 | 1,452 | 1,711 | 3,163 | 91.8 | 108.9 | 101.0 |
| | 0.8% | 5.6% | 3.4% | | | |
| 1998 | 1,449 | 1,815 | 3,264 | 93.8 | 109.5 | 102.5 |
| | -0.2% | 6.1% | 3.2% | | | |
| 1999 | 1,479 | 1,947 | 3,426 | 95.5 | 107.5 | 102.3 |
| | 2.0% | 7.3% | 4.9% | | | |
| 2000 | 1,496 | 2,109 | 3,605 | 96.1 | 104.5 | 101.0 |
| | 1.2% | 8.3% | 5.2% | | | |
| 2001 | 1,475 | 2,265 | 3,740 | 100.0 | 101.0 | 100.0 |
| | -1.4% | 7.4% | 3.7% | | | |
| 2002 | 1,503 | 2,483 | 3,985 | 100.0 | 100.0 | 100.0 |
| | 1.9% | 9.6% | 6.6% | | | |
| 2003 | 1,512 | 2,699 | 4,210 | 101.8 | 98.0 | 99.4 |
| | 0.6% | 8.7% | 5.6% | | | |
| 2004 | 1,536 | 2,950 | 4,486 | 102.2 | 95.8 | 98.0 |
| | 1.6% | 9.3% | 6.5% | | | |
| Average annual growth rates (calculated by fitting a log-linear regression line by the method of least squares to give a compound growth rate) | | | | | | |
| 1964-04 | 0.1% | 3.8% | 1.7% | 7.3% | 6.0% | 7.0% |
| 1973-04 | 0.2% | 4.3% | 2.1% | 5.8% | 4.4% | 5.4% |
| 1978-04 | 0.3% | 4.8% | 2.6% | 4.3% | 2.8% | 3.8% |
| 1983-04 | 0.5% | 5.2% | 3.0% | 3.4% | 1.8% | 2.8% |
| 1988-04 | 0.5% | 5.5% | 3.2% | 2.8% | 0.8% | 1.9% |
| 1993-04 | 0.8% | 6.9% | 4.3% | 2.0% | -0.4% | 0.7% |
| 1998-04 | 0.8% | 8.5% | 5.4% | 1.5% | -2.0% | -0.6% |

Overall Development Pipeline

- 4.4 Planning policy has substantially reduced the flow of new out-of-centre retail development, with developers encouraged to regenerate the more complicated edge-of-centre and in-centre sites. As a consequence, the UK is in the midst of a construction boom in town centre-located shopping centres, surpassing even the building boom of the 1970s. Verdict predicts that in-centre shopping space will increase by 28 per cent between 2002 and 2007.
- 4.5 In 2004, schemes located within town centres accounted for over 78 per cent of the total shopping centre pipeline in the UK, which is significantly higher than in 1993 when schemes located in town centres accounted for just 64 per cent of the development pipeline¹⁸. Whilst these trend data relate to shopping centres (as opposed to all shops), they demonstrate the increasing popularity of town centre locations in the context of ever-tightening planning policy. The opening of schemes such as Birmingham's Bullring in September 2003 has further raised the profile of shopping centres as fundamental drivers of major town and city centre regeneration projects, and there is a particularly strong pipeline of new shopping centre developments for at least three years ahead. In the period to 2008, four 1 million sq.ft+ schemes are scheduled to open, in Bracknell ('Bracknell Eye'), Bristol (Broadmead), White City and Liverpool (Paradise Street).

Location of Retail Investment

Permissions/Appeals

- 4.6 We undertook an analysis of appeal decisions in respect of outline planning applications for new retail parks in out-of-centre locations which were issued between Mr Caborn's parliamentary answer of 11 February 1999, when he introduced the 'need' test, and September 2004. Using the Development Control Services database, we identified 30 relevant appeal cases for new retail parks, or for freestanding retail warehouses - that is, excluding appeals in respect of extensions to existing parks, reserved matters applications and applications for changes to conditions¹⁹ - and we can report that 10 were permitted and 20 dismissed, indicating a failure rate of around two-thirds. This indicates that PPG6 and subsequent policy clarifications have had the desired effect, of making it more difficult to secure planning permission for retail development in out-of-centre locations vis-à-vis town centre locations.

Table 4.2 Analysis of Appeal Decisions in England (Out-of-Centre Sites), Post-Caborn Statement to Sept 2004 (Excluding Variation of Conditions, LDC and Reserved Matters Applications)

| | Permitted | Dismissed | Total Appeals |
|---------------------------------|-----------|-----------|---------------|
| A1 Food | 0 | 0 | 0 |
| A1 Retail Warehouses (Non-food) | 10 | 20 | 30 |
| A1 Other Non-food | 0 | 0 | 0 |
| A1 Mixed Food & Non-food | 0 | 1 | 1 |
| Totals | 10 | 21 | 31 |

Source: Development Control Services

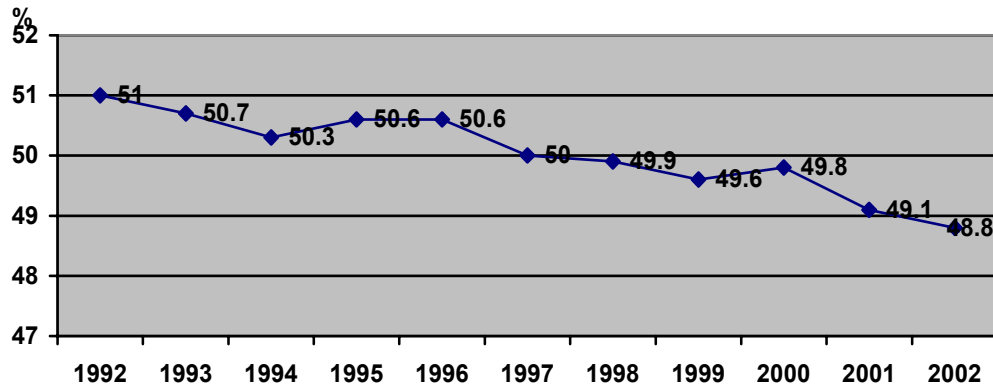
¹⁸ Source: CB Richard Ellis, *UK Retail Briefing*, Q3 2004.

¹⁹ This is because the principle of retail development in these locations has already been established, and retail development proposals in these locations are therefore more likely to succeed.

Sales and Number of Outlets

- 4.7 Despite the increasing difficulty associated with securing planning permission for retail development in out-of-centre locations, according to Verdict the 'high street'²⁰ accounted for 49 per cent of total retail sales in 2002, compared with 51 per cent in 1992 (Figure 4.2). Much of this erosion of 'high street' sales can be attributed to the continued strength of existing retail facilities in out-of-centre locations and the growth in e-tail.

Figure 4.2 'High Street' Share of Total Retail Sales, 1992-2002



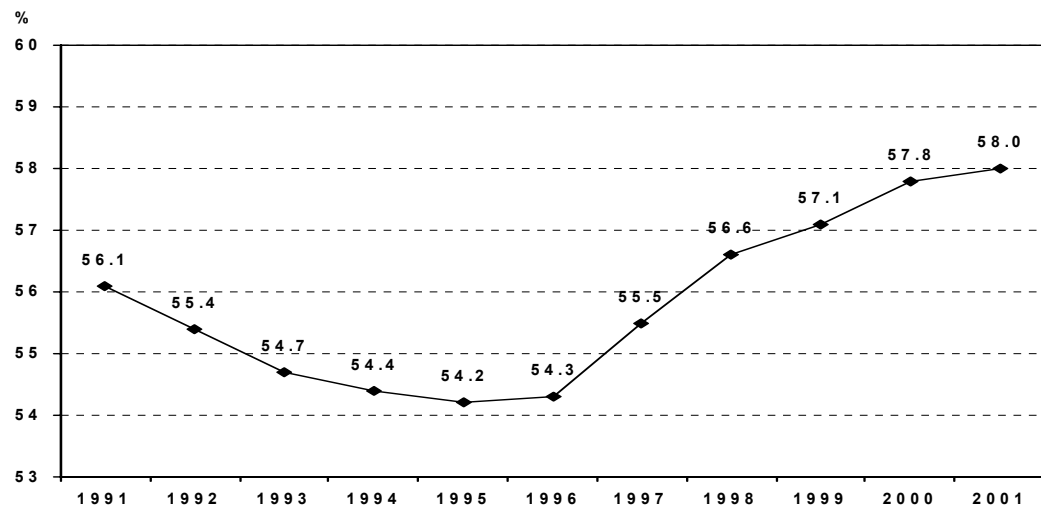
Source: Verdict

Note: 'High street' figures include out-of-centre shopping malls such as Bluewater.

- 4.8 The larger format of out-of-centre stores (compared with town centre stores, which typically have smaller footplates) means that retailers require fewer stores in order to increase sales, hence the relative decline of 'high street' sales share. Nevertheless, whilst the share of sales has drifted towards the out-of-centre retailers and e-tail (Figure 4.2), the 'high street' increased its share of all retail outlets in the latter part of the decade, largely as a result of Government policy (Figure 4.3). This trend looks set to continue, particularly with the virtual end of the development of new, out-of-centre regional shopping centres such as Lakeside and Bluewater and the focus instead on town centre schemes.

²⁰ Verdict's definition of 'high street' is "deliberately broad"; it includes traditional high streets, in-town shopping centres and regional 'out-of-town' (Verdict's term) shopping malls such as Meadowhall, Merry Hill, the Trafford Centre, the Lakeside Mall and Bluewater. Verdict's 'out-of-town' definition includes retail parks (minimum three retailers/50,000+ sq.ft of trading space). We therefore consider that Verdict's 'out-of-town' definition embraces both 'out-of-centre' and 'out-of-town' locations as defined by Table 2 of PPS6.

Figure 4.3 'High Street' Outlet Numbers - Share of All Outlets 1991-2001



Source: Verdict.

- 4.9 Verdict provides interesting information on the sales performance of 12 key retail brands on the 'high street'²¹ from a cross-section of retail sectors: Marks & Spencer, Next, BHS, Debenhams, House of Fraser, John Lewis, Woolworths, Argos, Boots, WHSmith and HMV. Collectively these 12 key retailers accounted for 26.5 per cent of all money spent at 'high street' retailers in 2002, up from 25.6 per cent in 2001 and from 23.3 per cent in 1992, indicating that these retailers are gradually gaining ground at the expense of smaller retailers. CB Richard Ellis confirms that larger retailers are increasing their market share, which it ascribes to their ongoing expansion of product range, and their consequent ability to sell goods at substantially lower prices than other smaller retailers due to the greater volume of products being offered.
- 4.10 Of the 12 retailers listed above, Marks & Spencer and BHS achieved the lowest levels of sales growth between 1997 and 2002, of just 5.1 per cent and 8.6 per cent, respectively, compared to the 'high street' average growth over the period of 22.6 per cent²². Whilst the fortunes of both of these retailers have since improved, their difficulties between 1997 and 2002 was a major contributory factor to the substantial sales growth experienced by Next over the same period, of 111.6 per cent, which is by far the greatest increase of the 12 key retailers monitored.
- 4.11 National retail trends indicate a continuing contraction in the number of shop units. Total store numbers in the UK declined by 13.7 per cent between 1992 and 2002. This masks variations in the decline of different types of stores and different locations. With the emergence and growth of superstores during the 1990s, there has been a decline in the number of smaller and more specialist food retailers, which have declined in number by 19 per cent from 48,301 in 1992 to 39,131 in 2002. In contrast, the number of large food superstores has increased by 50 per cent over the same period, from 860 in 1992 to 1,292 in 2002.

In-town Retail Development Trends

- 4.12 The space requirements of retailers on the 'high street' and particularly in shopping centre locations are being reconsidered and, increasingly, operators are requiring larger footprints. Demand is strongest for large units of 20,000 sq.ft and above, particularly from retailers such as Wilkinsons, TH Hughes and Primark. Demand is

²¹ See previous footnote for Verdict's definition of 'high street'. Verdict's criteria are 'retail fascias whose stores are predominantly in high street or shopping centres, and by definition this excludes retailers that focus on standalone stores, such as grocers and other out-of-town retailers and also retail groups that are composed of several individual fascias'.

²² Source: Verdict Analysis, *Verdict on the High Street 2003*.

also robust for mid-sized units (5,000 to 20,000 sq.ft) from operators like Peacocks, New Look and HMV. The only segment of the market where there is reasonable availability is small units, although demand for these is said to be weaker.

- 4.13 Next is a good example of a retailer that has taken a strategic decision to relocate to larger units. In 1999, Next had 38 per cent of its stores in units of 5,000 sq.ft or less, but this proportion dropped to 23 per cent by 2003. Conversely, Next had 16 per cent of its stores in units of over 20,000 sq.ft in 2003, compared with just 6 per cent in 1999. Similarly, operators such as H&M and Zara are requiring large footprints in order to be able to compete with one another and with off centre locations, showcase extensive product ranges and provide sufficient in-store facilities.
- 4.14 In the past, much of the retailer demand could be met through a re-cycling of the existing retail stock. However, the supply of vacant units in primary and good secondary locations in UK high streets is extremely limited (under 5 per cent in most key locations, which is an historic low²³). Hence, the need for new shopping centres so as to improve the supply of larger-floorplate units.
- 4.15 The shortage of supply on the high street is one factor behind the continuing rise of rents. Verdict reports that between May 1998 and May 2003, prime high street retail rents grew by an average of 23.7 per cent.
- 4.16 There is now increasing pressure from retailers for the benchmark lease term of fifteen years to be reduced to 10 years. This accords with operators' needs for greater flexibility, and shorter lease lengths will afford landlords more frequent opportunities to reconfigure and/or redevelop their units. Such flexibility will also assist in meeting the growing demand for larger sized units of over 5,000 sq.ft.

Out-of-Centre Retail Trends

- 4.17 Opinion appears to be split over whether the retail warehouse pipeline is starting to dry up as planning restrictions hit the sector. According to FPD Savills' *Definitive Guide to Retail and Leisure Parks 2005*, second-hand supply is now more than four times the supply of uncommitted, newly built retail warehouse space; thus, FPD Savills asserts that almost 8m sq.ft of floorspace built before 2004 is currently vacant, or occupied but available, compared with just under 2m sq.ft of newly built, available space. Furthermore, much of the new floorspace represents extensions to existing retail parks.
- 4.18 Donaldsons reports an out-of-centre development pipeline amounting to 6m sq.ft, of which 2m sq.ft is currently under construction. However, Donaldsons suggests that opportunities for large scale retail warehousing have become limited with a trend towards smaller retail parks of around 50,000 sq.ft to 75,000 sq.ft in smaller towns.
- 4.19 One interesting recent trend is the switch back from out-of-centre to in-centre, by retailers such as PC World, Courts, Matalan and Allied Carpets. This is a consequence of the ever-increasing cost and lack of availability of suitable out-of-centre space, coupled with retailers' desire to add an in-centre dimension to their offer.
- 4.20 Nevertheless, a broadening range of traditional high street retailers occupy space in retail park locations, although this has almost exclusively been at the larger existing retail parks given the ever tightening planning policy. Next, TK Maxx and Argos continue to seek expansion both in and out-of-centre.
- 4.21 Increasingly, traditional high street retailers are seeking to diversify their formats and provide out-of-centre facilities. For example, Boots and WHSmith are investing in out-of-centre retail park stores, although they are finding it difficult to differentiate their offer sufficiently from their high street stores, and therefore tend to merchandise a greater proportion of lower value items in their out-of-centre stores. Clothing and footwear has also been moving into out-of-centre retail parks over the last 10 years. For instance,

²³ CB Richard Ellis, *UK Retail Briefing*, Q3 2004.

Next is focusing on out-of-centre development, using the Directory and online products to stock the larger format. However, while many leading high street retailers have opened out-of-centre stores, they often view it as exploiting an additional sales channel rather than an engine of growth, and the rate of new openings has been slow.

- 4.22 A number of large retailers have taken advantage of a loophole in the planning legislation which has allowed them to increase the floorspace of their units by installing mezzanine floors, which in some cases has enabled diversification into other product ranges. Currently, no planning permission is needed if there is no external change to the building. Both Next and TK Maxx have been utilising mezzanines as one means of satisfying their pursuit of larger stores. However, the Government is keen to close this legal loophole, and the planning Minister, Keith Hill, announced at the beginning of March 2005 that the Government will invite views on whether to require retailers to apply for permission for mezzanines of over 2,150 sq.ft (200 sq.m). This would apply predominantly to the largest units - most of which are in out-of-centre locations - leaving smaller town centre businesses able to expand.

Polarisation Towards Larger Centres

- 4.23 A significant and long term trend is the continuing polarisation by retailers towards larger schemes in larger centres - to the detriment of smaller centres - which is driven by a number of factors. Retailers recognise that greater efficiency can be achieved by having a strategic network of large stores offering a full range, rather than having a large network of smaller stores, and are therefore increasingly seeking to serve larger population catchments from larger stores. It is also driven by consumers, who are becoming more discerning, and are prepared to travel further. According to Cambridge Econometrics, the number of shoppers visiting the top 50 UK retail centres was 10 per cent higher in 2004 than in 2002, and 20 per cent higher than in 2000, whilst the number of shoppers visiting towns outside the top 100 was 4 per cent lower in 2004 than in 2002, and 13 per cent lower than in 2000²⁴.
- 4.24 There is therefore a concentration of comparison goods expenditure in a smaller number of larger centres; according to Cambridge Econometrics, 51 per cent of all comparison goods expenditure goes to the 100 largest centres. This is being reinforced by new development particularly in shopping centres and malls. Most of the shopping centre floorspace in the pipeline is destined for these same 100 centres, which will further reinforce their dominant market share. This concentration of retailing in larger centres is likely to threaten some medium and smaller towns.
- 4.25 The polarisation trend may have implications for centres in Fenland District, perhaps best illustrated by the continued dominance in the sub-region of Peterborough city centre, and the emergence and growth of substantial retail parks close to but outside of the catchment area (such as those at Peterborough and King's Lynn), which has not been matched by the parallel growth of centres in Fenland. The focus of retailers and developers is increasingly concentrated on larger developments in dominant city centres which are, or have the potential to become, 'top 50' destinations with strong catchments.
- 4.26 At the other end of the spectrum, the growth of the dominant foodstores and decline in unit numbers poses similar challenges for small town centres and district/local centres which rely on their convenience/service base. A clear picture is emerging of a network of large dominant superstores, and corresponding decline/diversification in the traditional smaller centre. We discuss this in greater detail, below.

²⁴ Source: Cambridge Econometrics, in *UK Retail Report* (3rd Edition), BCSC, November 2004.

Trends in Key Retail Sectors

Clothing & Footwear

- 4.27 Clothing & footwear is the second largest area of retail spending in the UK after food & grocery and the most important for high street retail. However, spending on clothing & footwear is growing more slowly than spending in other sectors, for several reasons. The ageing population profile means that there is a declining population of young people and growth in the older population, which takes less interest in fashion. New technologies (such as MP3 players) have diverted spending away from clothing & footwear. Furthermore, the entry and success of grocers and value clothing & footwear specialists has exerted downward pressure on prices, thereby forcing traditional high street operators to adjust their pricing structure to compete.
- 4.28 Changes are occurring in the traditional 'high street' fascias as evidenced by closures and rationalisation and the emergence of new retailers, although these changes are most likely to affect the larger centres, which the prominent retailers target. After a period of rationalisation and overall reduction in the number of outlets across the country, Arcadia - whose high street fascias include Top Shop/Man, Burton, Dorothy Perkins, Evans and Warehouse - is again actively looking for high street representation. New retailers have emerged in recent years, including international fashion stores such as Mango and H&M. Other fashion sector retailers including River Island, Alexon, Zara, French Connection, Monsoon, Next, Fat Face and Coast are all prospering and have stated an interest in securing additional stores.
- 4.29 Retailers which are expanding more generally on the high street include value orientated operators such as the clothing retailer Primark, which has increasingly moved away from sites in more secondary locations to higher profile sites in town centres, and Peacocks. Overall, value orientated retailing looks to be a key growth area. As a reaction to this, middle market operators are segmenting their offer further, providing either more upmarket own brands such as Per Una and Blue Harbour in Marks & Spencer, or more heavily discounted offers such as that in New Look. Diversification into other sectors is also occurring, particularly into homewares; for example, Next and Monsoon are increasingly offering 'interior' products.

Bulky Goods

- 4.30 The DIY sector has performed strongly in recent years, boosted by greater media interest and a parallel increase in the public's interest in DIY and home improvement, as well as by growth in household numbers. Annual growth rates of around 7 per cent have been maintained since 1996 - making DIY the fastest-growing retail market - and Verdict predicts growth rate increases of around 7 per cent per annum in the period to 2007. Furthermore, demographics favour DIY retailers; in an ageing population key growth is forecast in the 60-64 age group, which typically has more time to devote to DIY projects.
- 4.31 Notwithstanding the general optimism surrounding the DIY sector, several commentators have noted the slowdown in the housing market. Annual house price growth currently stands at 3 per cent, which is significantly down on the 20 per cent peak reached during 2004, and market analysts predict that house price growth is likely to remain low for the next few years. This is having an adverse impact on consumer spending, particularly in relation to big ticket, higher-value items.

Other Comparison Sub-sectors

Department Stores

- 4.32 Department stores attract older, more affluent customers - whose numbers are growing as a result of demographic change - than other types of retail store. With improved trading potential - and the result of revised thinking in terms of the catchment sizes required by these stores - the major department store operators are keen to obtain additional sales space and the present period is one of unprecedented activity in the

department store sector. It remains the case, however, that stand-alone department store developments are rarely viable; consequently, new store acquisition openings are confined to shopping centre developments, where landlords/developers are prepared to contribute to the fit-out costs in order to secure an 'anchor' trader that will enhance the profile and lettability of the development.

- 4.33 Whilst Selfridges, Harvey Nichols and House of Fraser all require major city centre locations, other major store operators have recently revised their thinking and consider that even medium-sized centres will sustain their stores. Debenhams - which currently has 116 stores in the UK - is considering smaller towns with populations of 75,000 for a roll-out if its mini department store format. According to press reports, Debenhams is planning to open between 120 and 140 mini depart stores from 2006. Next is also looking to enter the department store market, and reportedly wants larger stores in 75 per cent of its locations.

Electricals

- 4.34 The electricals market is the second-fastest growing after DIY and the third largest in size after food & grocery and clothing & footwear. Technological advances are the most important source of growth in the electricals market, with key drivers including MP3 hi-fi systems and the next generation of PCs.

Factory Outlet Centres

- 4.35 Factory outlet centres (FOCs) are retail developments that incorporate stores offering discounted brand goods which are typically out of season, or end of season, or slightly defective, or which represent excess stock. The retail units are owned and operated by:
- the manufacturers of the branded goods;
 - companies operating as exclusive licensees or franchisees of a brand; or by
 - vertically integrated retailers such as Next which manufacture their labels and retail them on the High Street or in out-of-centre locations.
- 4.36 As of mid-2002 there were 44 FOCs in the UK providing for about 560,000 sq.m (6.03m sq.ft) of floorspace and accounting for one per cent of all retail sales. FOCs typically house 50 to 100 tenants and the largest in the UK is Cheshire Oaks which provides for 32,500 sq.m (350,000 sq.ft) of retail floorspace. Only one of these existing FOCs is located in a town centre location (the scheme at Aldershot). Providers of FOCs have not sought town centre locations because manufacturers are unwilling to run the risk of cannibalising their full price high street sales.
- 4.37 Usually fashion and sports goods represent around two thirds of the floorspace in FOCs because of their vulnerability to changing market trends. Increasingly FOC operators are seeking to attract commercial leisure operations, so as to extend visiting times. A high proportion of visitors to FOCs travel significant distances by car and coach, although catchment areas will shrink when the market becomes fully saturated.
- 4.38 Activity in FOC development continues, but at a much slower pace than in the 1990s, and confined to extensions to existing FOCs. In 2003 the First Secretary of State dismissed a major FOC proposal at an out-of-centre location at Burntwood, near Walsall, and the prospects for new FOC development have been made more remote given the publication of PPS6 in March 2005, which re-emphasises the Government's 'town centres first' policy. Furthermore, given the recent success of value operators such as TK Maxx, the 'uniqueness' of FOCs has been diluted. Press reports relating to the proposed Shannons Mill FOC in Walsall town centre suggest that the scheme's pre-let target has not been met and that it may not proceed.

Convenience Sector

4.39 Table 4.3 provides details of the total convenience sector market share between 1993 and 2003, broken down as 'larger superstores', 'smaller supermarkets and grocers', 'food specialists' and 'other stores'²⁵. The table shows that in 1993, 'larger superstores' accounted for just under 32 per cent of total convenience sector sales, with 'smaller supermarkets and grocers' achieving a combined market share of 34 per cent. However, by 2003, 'larger superstores' accounted for 41 per cent of total convenience sector sales, compared to just over 30 per cent for 'smaller supermarkets and grocers'. This increase in the market share of 'larger superstores' can largely be attributed to their incursion into the higher-margin non-food goods sector. The overall market shares of 'food specialists' and 'other stores' also declined over the ten-year period.

Table 4.3 Convenience Market Share by Retailer Type, 1993-2003

| | Larger Superstores | | Smaller Supermarkets & Grocers | | Food Specialists | | Other Stores | | Total Sales (£m) |
|------------------|--------------------|------------------|--------------------------------|------------------|------------------|------------------|--------------|------------------|------------------|
| | Sales (£m) | Market Share (%) | Sales (£m) | Market Share (%) | Sales (£m) | Market Share (%) | Sales (£m) | Market Share (%) | |
| 1993 | 25,520 | 31.9 | 27,204 | 34.0 | 7,811 | 9.8 | 19,531 | 24.4 | 80,066 |
| 1994 | 28,595 | 34.2 | 27,765 | 33.2 | 7,431 | 8.9 | 19,853 | 23.7 | 83,644 |
| 1995 | 31,465 | 35.8 | 29,137 | 33.1 | 7,156 | 8.1 | 20,239 | 23.0 | 87,997 |
| 1996 | 34,055 | 36.7 | 30,789 | 33.2 | 7,028 | 7.6 | 20,960 | 22.8 | 92,832 |
| 1997 | 36,505 | 34.4 | 31,975 | 32.8 | 7,010 | 7.2 | 22,065 | 22.6 | 97,555 |
| 1998 | 38,951 | 38.1 | 33,165 | 32.4 | 7,167 | 7.0 | 22,987 | 22.5 | 102,270 |
| 1999 | 41,284 | 38.9 | 33,862 | 31.9 | 7,163 | 6.7 | 23,902 | 22.5 | 106,211 |
| 2000 | 43,469 | 39.7 | 34,102 | 31.2 | 7,472 | 6.8 | 24,378 | 22.3 | 109,421 |
| 2001 | 46,468 | 40.4 | 35,447 | 30.8 | 7,603 | 6.6 | 25,420 | 22.1 | 114,938 |
| 2002 | 48,705 | 40.8 | 36,813 | 30.8 | 7,681 | 6.4 | 26,228 | 22.0 | 119,427 |
| 2003 | 50,799 | 41.0 | 38,226 | 30.8 | 7,827 | 6.3 | 27,123 | 21.9 | 123,975 |
| Change % | | | | | | | | | |
| 1993-2003 | 99.1 | | 40.5 | | 0.2 | | 38.9 | | 54.8 |
| 1993-1998 | 52.6 | | 21.9 | | -8.2 | | 17.7 | | 27.7 |
| 1998-2003 | 30.4 | | 15.3 | | 9.2 | | 18.0 | | 21.2 |

Source: Derived from Table 3 of *Verdict on Grocery Retailers* (Verdict, 2003), which is based on current (2003) prices.

4.40 Table 4.3 also shows that the total sales of the 'larger superstores' effectively doubled between 1993 and 2003, compared to a corresponding increase over the same period of just over 40 per cent for 'small supermarkets and grocers'. The sales growth achieved by 'other stores' was slightly lower, at just under 39 per cent. However, the real losers in the market share battle appear to have been the 'food specialists', whose total sales grew by just 0.2 per cent between 1993 and 2003.

²⁵ Verdict's definitions of these types of retailers are thus: 'Larger superstores' - grocery stores with a sales area greater than 25,000 sq.ft; 'smaller supermarkets and grocers' - supermarkets, Co-ops and convenience stores with a sales area of less than 25,000 sq.ft; 'food specialists' - butchers, bakers, greengrocers, fishmongers and other food specialists; and 'other stores' - off-licenses; newsagents and bookstores; music, video and software specialists; tobacconists; health & beauty retailers; and department stores with food lines.

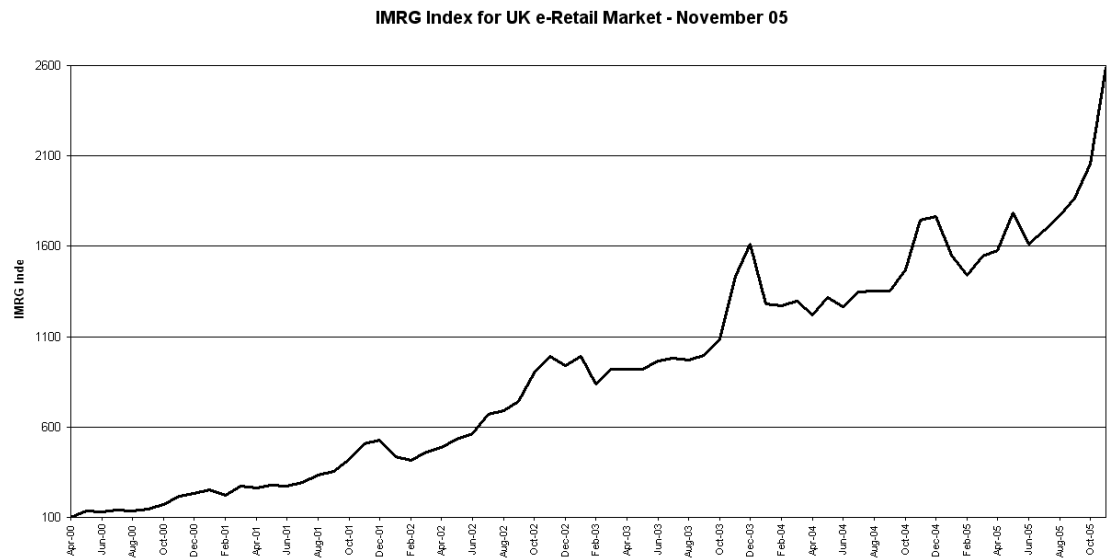
- 4.41 The New Economics Foundation (NEF) publication, *Ghost Town Britain II* (2003), looks at the nationwide impact of supermarkets on local shops and communities. According to the report, VAT figures show that between 1994 and 2002, the number of independent businesses selling food, tobacco and beverages fell by nearly 30,000, equating to more than 40 per cent of the nation's stock of such shops. Furthermore, the report asserted that there were 953 fewer convenience stores in 2001 than in 2000, and predicted that a further 28,000 outlets may close by 2005 as a result of increased competition from supermarkets. The analysis in our Table 4.3 would appear to verify the trends described by the NEF, which attributes the decline of small shops largely to the superstore operators, including Tesco in particular - which alone controls almost one-third of the food retail market - and Asda and Sainsbury's, which also have substantial shares of the market.
- 4.42 Similarly, the Association of Convenience Stores (ACS) warned in September 2002 that competition from supermarket chains is making it increasingly difficult for independent shop owners to survive. The ACS warned that 1,000 independent convenience stores have ceased trading every year for the past decade, leaving about 55,000 in business.
- 4.43 The major foodstore operators are increasingly seeking to diversify into non-food markets. One pertinent example of this is Asda's first Living Store, opened during 2004 in Walsall, which sells clothing, homewares, electronics and entertainment items. Tesco also recently opened its pilot, 30,000 sq.ft non-food store - Tesco Home Plus - at the Crownpoint Shopping Park at Denton, Manchester, in the autumn of 2005. However, the major supermarket operators are reluctant to shrink food retail space, because the food component of their businesses is also performing strongly.
- 4.44 The expansion of foodstore operators' non-food offers via their out-of-centre superstores - thereby providing a convenient one-stop shop for most food and non-food needs - represents a significant threat to high street retailers. Furthermore, out-of-centre space is cheaper than comparable space in town centres, making it easier for out-of-centre superstores to compete on price, while adjacent parking makes them much more convenient for bulkier household goods. Woolworths is one of the high street names that have suffered most as a consequence of this trend. Boots, another key high street player, is also challenged by the expansion of foodstore operators' non-food ranges, particularly as a result of the major supermarkets' incursion into health & beauty products and in-store pharmacies.

E-tail and Home Shopping

E-tail

- 4.45 UK internet sales have increased significantly in recent years since consumer confidence in online retailing has risen as shoppers have found the internet increasingly easy to navigate, credit card use to be secure and delivery to be convenient and reliable. According to the Interactive Media in Retail Group (IMRG), the UK population spent shoppers spent £4.98 billion online during the 10-week run-up to Christmas 2005, compared with £3.33 billion during the same period in 2004, and online sales of £2.3 billion in the run-up to Christmas 2003.
- 4.46 The IMRG's Index of the UK e-tail market (where April 2000 = 100) reached a new all-time high of 2,602 in December 2005 (Figure 4.4).

Figure 4.4 Index of Growth in Internet Sales, April 2000 to October 2005



Source: IMRG, *e-Retail Sales Index Report*, December 2005.

- 4.47 Certain sub-sectors are likely to be more affected by growth in e-tail than others, since the internet has particular attraction for certain types of retailing, including books, CDs and high value electrical goods; as an illustration of its increasing popularity, sales in the latter sector were 95 per cent higher in December 2003 than in December 2002. Yet, despite previous predictions by many commentators to the contrary, e-tail has failed to sound the death-knell for retailers on the high street. Indeed, it is the high street retailers themselves who are the primary participants in e-tail (as opposed to new, non-property based entities), with many key national multiple retailers now viewing online sales as a key complementary function to their existing store operations.
- 4.48 Whilst the whole of the internet shopping sector continues to grow strongly, the fastest-growing online shopping sector is clothing & footwear, which passed the £100m-per-month sales barrier for the first time in March 2004. This sector now accounts for nine per cent of all UK internet sales. We consider that the 'must try it on/feel it' factor is likely to mean that multiple high street clothes & footwear retailers will generally remain competitive in the face of any further expansion of e-tail. Notwithstanding this, Colliers CRE advises that traditional UK fashion retailers need to follow the example set by those in other sectors and maximise the opportunities offered by the internet to companies with strong brand recognition, or they will risk losing market share to new competitors whose overheads are substantially lower, such as online clothes retailer ASOS.
- 4.49 Verdict suggests that the 'clicks and mortar' approach could further increase the concentration of markets. Centres that offer a range of complementary, non-retail attractions and/or offer a high level of convenient shopping facilities are likely to be more resilient to these changes.

Catalogue Shopping

- 4.50 In the pre-internet and digital television era, catalogue shopping played a key role in the home delivery market. However, whilst Verdict asserts that £1 in every £7 spent in Britain was on goods delivered to people's homes²⁶ - which on the face of it would imply a boom time for catalogues - the catalogue shopping market has seen sales

²⁶ As reported at www.imrg.org (February 2005).

decline in recent years. According to the IMRG, online sales have outpaced catalogue sales, which have peaked at no higher than 5 per cent.

- 4.51 Debenhams recently abandoned its mail order catalogue, moving its home shopping facility to the internet. Otto UK, the home shopping group that owns the Grattan and Freemans brands, is also looking to improve its internet offering, and is encouraging existing customers to buy online through advertising within the catalogues and corresponding digital communication. Thus, it is not just high street retailer channels which are having to adapt to the digital age.

Conclusions

- 4.52 The key conclusion from our analyses is that planning policy has begun to 'bite' in recent years, with it becoming increasingly difficult to secure planning permission for new retail floorspace in out-of-centre locations, vis-à-vis schemes in town centre locations. Whilst town centre and edge-of-centre locations are generally more complex than sites in out-of-centre locations, investor confidence in town centre schemes has been increasing in recent years, and there is now a construction boom in town centre-located shopping centres.
- 4.53 Other key trends in the retail markets include the increasingly large floorplate requirements of retailers, with strengthening demand for units of 5,000 sq.ft and above; the continuing 'polarisation' by retailers towards larger centres; the increasing diversification into non-food markets by the major foodstore operators; and the continuing growth of e-tail.

Leisure Sector

Social and Economic Change

Personal Disposable Income

- 4.54 The leisure industry has benefited from the continued growth in household disposable income and final consumption. Competitive forces have reduced the price of essentials, allowing an ever increasing proportion of consumer expenditure to be spent on leisure items whether for in home entertainment or spent outside the home. The following table reflects this continued trend at a national level.

Table 4.4 Trends in Household Disposable Income and Consumption

| Household Disposable Income and Final Consumption Trends | | | | | |
|--|-------------|-------------|-------------|---------------------|---------------------|
| United Kingdom | 1998 £Bn | 2004 £Bn | 2011 £Bn | Growth 1998-2004 | Growth 2004-2011 |
| Household Disposable Income | 612.11 | 754.80 | 900.83 | 23% | 19% |
| Household Final Consumption | 587.54 | 719.27 | 851.70 | 22% | 18.4% |

Source: Experian, Autumn 2004. 2001 prices.

Changing Social Structure

- 4.55 The move away from the industrial base has led to a reduced requirement for skilled and unskilled manual jobs which are classified in the C2 and D social groupings. There are more jobs in commerce and a far greater proportion of women graduating and entering the professions has increased the proportion of the population falling under the ABC1 classifications. The ABC1 groupings are the categories that tend to be the largest users of leisure facilities, having a greater proportion of disposable income. This trend is set to continue.
- 4.56 According to Mintel the following change in socio-demographic profiles will occur between 1997 and 2006.

Table 4.5 Changes in Socio-Demographic Profiles 1997-2006

| | 1997 % of Pop | 2006 % of Pop |
|----|---------------|---------------|
| AB | 21.2 | 27.1 |
| C1 | 27.2 | 28.5 |
| C2 | 22.6 | 18.7 |
| D | 16.9 | 16.8 |
| E | 11.6 | 8.8 |

Source: Mintel British Lifestyles 2003

Demographic Trends

- 4.57 Population projections from the ONS show that, nationally, the population will shift towards being more weighted towards the over 45 age group during the next twenty year period. Between 2001 and 2011 there will be a net increase of those in the 16-24 age group, which is a group that is extremely active in the leisure market. There will be a net loss of those aged 0-15 and in the 25-34 age groupings, but all other groups will gain. There will be a gain in the important 16-24 group. People in this group are important because they have the highest propensity to indulge in a number of leisure activities including going to the cinema, eating out, visiting pubs, tenpin bowling and going to nightclubs.

Household Composition

- 4.58 The household type that is forecast to experience the greatest increase over the next two decades is one person households. Whereas, traditionally, an increase in one person households has been associated with the retired, the largest increases are forecast to be within people of working age, particularly amongst men. One person households will account for 72 per cent of new households, a factor which has ramifications for the leisure industry.
- 4.59 There has also been a trend towards young adults remaining at home in their 20s and 30s. Currently there are around 2.2 million young adults of this age living with their parents, of which 63 per cent are male. In the 20-24 age group, 56 per cent of men live with their parents. This could also be a high spending group providing they are not foregoing spend to save for deposits on a house.

Leisure Time

- 4.60 Data from the Leisure Industries Research Consultancy (LIRC) shows that since 1998 the leisure time for the average full time worker has increased by 2.2 per cent, to 2,595 hours per annum. Fifty two per cent of households now have access to the internet compared with 9 per cent in 1998. This implies that the total amount of leisure time now spent on the home computer will have increased, and sophisticated modes of access will also increase dwell time on computers.
- 4.61 For some time, there has been an increasing tendency to eat out and this has become established as a way of life. One of the most rapidly growing sectors in the mid 1990s was keep-fit. This now is an established market.
- 4.62 The LIRC shows that the total trend in leisure hours is set to increase from 160.0 billion hours in 2004 to 160.8 billion in 2008.

Growth in Leisure Expenditure and Changing Leisure Activities

4.63 Table 4.6 details changes in expenditure on various sub-sectors of the leisure market.

Table 4.6 Comparison Spend on Selected Leisure Activities 2000-2008

| | 2000 £m | 2001 £m | 2002 £m | 2003 £m | 2004 £m | 2005 £m | 2006 £m | 2007 £m | 2008 £m | % Change 2000-2008 |
|-------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|-----------------------|
| Bingo | 523 | 552 | 595 | 602 | 606 | 664 | 637 | 641 | 676 | 29.25 |
| Cinema* | 623 | 620 | 724 | 678 | 739 | 769 | 803 | 840 | 879 | 41.10 |
| Dancing/Discos | 749 | 752 | 790 | 832 | 885 | 941 | 999 | 1,060 | 1,127 | 50.50 |
| Spectator Sports | 767 | 808 | 826 | 909 | 998 | 1,121 | 1,217 | 1,337 | 1,485 | 93.61 |
| Eating Out | 33,011 | 34,376 | 36,782 | 38,916 | 41,160 | 43,700 | 46,226 | 48,939 | 51,865 | 57.10 |
| Alcoholic Drink** | 18,080 | 18,790 | 19,990 | 20,430 | 21,370 | 22,3 | 23,33 | 24,4 | 25.5 | 41.10 |
| Total Sightseeing | 934 | 943 | 1,046 | 1,077 | 1,137 | 1,194 | 1,256 | 1,321 | 1,390 | 48.80 |
| Total Gaming | 7,082 | 7,152 | 7,583 | 8,129 | 8,389 | 8,890 | 8,630 | 8,905 | 9,376 | 32.40 |
| Health & Fitness+ | 1,420 | 1,583 | 1,641 | 1,763 | 1,814 | 2,033 | 2,077 | 2,190 | 2,381 | 67.70 |

Source: Leisure Industries Research Consultancy (Current Prices)

* Relates to Gross Ticket Revenues only excluding VAT and concessionary income.

** This includes alcohol consumed in restaurants and hotels but adjusted for alcohol consumed at home

+ Private sector estimates. Local Authority income excluded

Eating Out

4.64 Within the last two to three year period there has been consolidation within the restaurant industry as some chains were expanding at a faster rate than demand. Many observers see the opportunity for huge growth in the eating out market. In 1990, 75 per cent of food consumption was in the home. By 2035 this ratio will have reduced to 50 per cent²⁷.

4.65 There is an increasing trend towards healthier eating, which has caused some fast food operators to change their menus for a healthier lifestyle. The public has not only become more discerning about food content but is also becoming more demanding about the speed and quality of service. This demand is known as fast casual and has been one of the largest growth areas in the USA, and the same trend has been emerging in the UK.

Pubs

4.66 The new Licensing Act will have an effect on some rural pubs. Later opening hours may drive longer drinking times in city centres. Pubs are also being affected by the long-term decline in beer drinking and the switching to wine consumption. Some are of the opinion that supermarkets will be selling the majority of lager and ale in as little as three years, swapping the living room for the pub in terms of beer consumption.

4.67 Social changes have also been driving this trend; employees are less likely to drink together. When employees do socialise, more wine will be drunk than beer. The drinks industry has also had to come to terms with women drinking more and having more disposable income. In order to combat these trends, 89 per cent of pubs now have a food offer. Beer, which used to account for 80 per cent of pub turnover, now accounts for around 43 per cent.

4.68 Town centres have been affected by weekend binge drinking. It is understood that the new Licensing Act will give councils the power to attach conditions to licenses which prohibit violent or anti-social behaviour. Therefore some councils might impose limitations on promotional activity and happy hours. This will impede the ability of some managers to boost sales during quiet times; some fear that a minimum pricing requirement will also push more beer sales the way of supermarkets.

²⁷ Peter Blackman, Horizons FS Ltd, British Hospitality Association Trends and Statistics 2003.

- 4.69 The impending smoking ban is likely to affect rural pubs more than city pubs. Some pubs which are predominantly 'wet', with drink forming a very high proportion of turnover, are likely to suspend their food offer.

Current Regional Provision in Growing Leisure Markets

Cinemas

- 4.70 Cinema attendances in 2004 totalled 171.3 million, representing a 2.4 per cent increase on 2003. They have not achieved the height seen in 2002, when admissions reached 175 million.
- 4.71 The year 2004 saw consolidation amongst four of the major exhibitors. Over-expansion in the earlier part of this decade resulted in some of the major exhibitors making losses. Some of the original multiplexes will be closed as they become obsolete and do not justify expenditure on refurbishment. More cinemas will have some digital screens and widen their appeal as they broadcast live sport and other major events and this trend will become more prevalent. As at the end of December 2004 the dispersion of cinema screens and attendances was as follows:

Table 4.7 Location of Screens and Annual Admissions Rates for Cinema Regions

| Region | Screens | 2004 Admissions (000) | People Per Screen | Admissions Per Head |
|-------------------|---------|-----------------------------|----------------------|------------------------|
| London | 781 | 44.168 | 14,085 | 4.02 |
| South | 273 | 16.049 | 16,850 | 3.49 |
| East of England | 224 | 11.177 | 18,750 | 2.66 |
| Midlands | 484 | 23.815 | 19,008 | 2.59 |
| Yorkshire | 296 | 14.001 | 16,554 | 2.86 |
| North East | 111 | 6.331 | 27,027 | 2.11 |
| Lancashire | 417 | 18.511 | 17,266 | 2.57 |
| Wales & West | 278 | 11.062 | 13,309 | 2.99 |
| South West | 95 | 3.772 | 23,158 | 1.71 |
| Border | 17 | 1.668 | 17,949 | 2.38 |
| Central Scotland | 249 | 11.877 | 13,253 | 3.60 |
| Northern Scotland | 68 | 3.430 | 13,253 | 3.81 |
| Northern Ireland | 160 | 5.380 | 10,000 | 3.37 |

Source: Cinema Advertising Association

Based on populations aged 4+. Regions classified by CAA are ISBA regions which differ from Government Office Regions.

The data are available for the 'East of England' region and do not go below this level.

- 4.72 Latest statistics available do not imply an oversupply of cinema screens within the East of England region as a whole.

Leisure Parks and Retail and Leisure Parks

- 4.73 During the 1990s the multiplex cinema development boom was characterised by a willingness for cinemas and associated operators to occupy on a leasehold basis. Accordingly a large number of leisure and retail schemes became available on the market. Leisure parks are parks of more than 30,000 sq.ft dedicated specifically to leisure, whereas often there was a mix of both retail and leisure which helped to make any scheme more viable, known as retail and leisure parks. The following table shows the regional distribution of such parks. It would imply that the Eastern 'region' has provision which is considerably below the national average.

Table 4.8 National Provision of Leisure and Retail and Leisure Parks

| Region | Parks | Gross Internal Area (sq.ft) | Population per (sq.ft) |
|---------------------|------------|-----------------------------|------------------------|
| Eastern | 4 | 470,365 | 11.50 |
| East Midlands | 9 | 665,447 | 6.33 |
| North | 12 | 1,360,829 | 1.84 |
| North West | 27 | 4,565,032 | 1.48 |
| Northern Ireland | 4 | 772,069 | 2.19 |
| Scotland | 17 | 2,632,009 | 1.92 |
| London & South East | 33 | 4,329,556 | 3.55 |
| South West | 11 | 1,815,624 | 2.73 |
| Wales | 6 | 997,514 | 2.92 |
| West Midlands | 17 | 1,903,062 | 2.70 |
| Yorkshire | 17 | 2,624,107 | 1.89 |
| Total | 152 | 22,135,614 | 2.67 |

Source: Trevor Wood Associates Database, December 2004

Impact of Planning Policy

- 4.74 There has been a tightening of Government policy towards driving retail and leisure developments to town centre locations and edge-of-town centre. Much improved architectural design has enhanced the town centre environments and many pub and bar operators have designed formats which have particular high street appeal. The challenge to many local authorities has been to design town centres which operate through days and evenings, rather than become deserted after 6pm, when office workers and shoppers have left the area and the area becomes deserted or appears threatening by the presence of a large amount of drinkers. The effect of the Licensing Act will be to extend drinking hours, although this is more likely to occur in town centres rather than in rural areas. The change in policy has caused more mixed use developments which combine leisure, retail and, occasionally, office space. Facilities for night-time leisure ensure that the parking facilities are utilised to their fullest extent.

5 PERFORMANCE ANALYSIS AND TOWN CENTRE BOUNDARIES

Performance Analysis - Introduction

- 5.1 Our analysis of the retail performance of the town centres of the market towns in Fenland District - Wisbech, March, Whittlesey and Chatteris - has involved:
- i) on-foot surveys of each town centre;
 - ii) photographic analysis;
 - iii) desk research in relation to the four town centres and a range of comparator centres²⁸; and
 - iv) face-to-face consultations with representatives of the business and property markets in the four towns.
- 5.2 Our analysis of the retail performance of the four town centres is based upon examination of a range of 'performance indicators', a number of which are specified in Section 4 of PPS6 as 'important indicators'. The performance indicators involve measurement and analysis of retail rankings; the diversity of uses; representation from national multiple retailers; the retail property offer; retailer demand; commercial yield on non-domestic property; change in shopping rents; vacancy rates; and pedestrian flows. Each of the performance indicators is analysed in detail below to provide a comprehensive analysis of the retail performance of the four town centres, by benchmarking it against the performance of competitor centres.
- 5.3 It should be noted, however, that much of the commercial retail and property data required to fully analyse performance is not available for Whittlesey and Chatteris, and only limited information is available on March. This unfortunately prevents us from being able to undertake full statistical analysis of these three town centres, although we supplement the analysis by drawing upon our empirical observations.
- 5.4 The detailed performance analysis data are contained in Annex 1 (Appendices to the Main Report); all mentions of Appendices in this section relate to those in Annex 1.

Performance Indicators

Indicator 1: Retail Rankings

- 5.5 Management Horizons Europe (MHE) surveys the top 1,672 retail centres in the United Kingdom in its 2003/04 'Shopping Index'. The Index is calculated through a weighted count of non-food retailers, comprising fashion retailers, non-fashion multiples and anchor stores. The Index is well respected; we consider it to be a robust source from which to assess centres' positions in the retail hierarchy.
- 5.6 The MHE Index establishes eight grades of retail centre in the United Kingdom, from 'Major City', through to 'Local Centre'²⁹. Analysis of the MHE Index shows that Wisbech and March are both categorised as sixth-tier 'District' centres. Neither Whittlesey nor Chatteris are ranked on the MHE Index, due to their small size. Table 1

²⁸ The 13 centres for which we provide benchmark data are Diss, Ely, Haverhill, Newmarket, St Ives (Cambridgeshire), St Neots, Stowmarket and Thetford, which are towns classified in Management Horizons Europe's 2003/04 Shopping Index as 'District'-ranking centres in East Anglia (St Ives is ranked 'Minor District'), and Bury St Edmunds, Cambridge, Huntingdon, King's Lynn and Peterborough, which are higher-order competitor centres in East Anglia.

²⁹ The eight tiers presented by the MHE Index are: 'Major City', 'Major Regional', 'Regional', 'Sub-Regional', 'Major District', 'District', 'Minor District', and 'Local'.

of Appendix 3 shows the positions of Wisbech and March in the retail hierarchy in relation to the 13 comparator centres³⁰.

- 5.7 The MHE Index reveals a slight decline in Wisbech's position in the retail hierarchy. Although over the period from 1995-96 to 2003-04 Wisbech experienced an overall slippage of just three places to 382nd position - in the intervening period the town ranked slightly higher, peaking at 361st.
- 5.8 Whilst some of the comparator towns outside of Fenland that are classified as 'district centres' by MHE have improved their positions in Index in recent years - the most notable being Ely, whose ranking improved by 81 places since 1995/06 - other similar-sized comparator centres have experienced slippage in the Index, and some of these have centres have slipped dramatically. Thus, Wisbech's slight slippage in the Index, whilst not welcome, does not give cause for major concern.
- 5.9 March ranks significantly lower in the MHE Index, and at equal 565th it is the lowest ranking of all the 'district' centres in the Index. As with Wisbech, the town's position in the Index deteriorated overall in the period 1995-96, when it was ranked 541st, to 2003-04; however March's latest placing of 565th marks a significant improvement from the preceding 2000-01 Index, when it was placed 670th, and from 1998-99, when it ranked 614th. March's current ranking places it equal with other towns such as Stowmarket, Sleaford, Rayleigh and Tewkesbury.

Indicator 2: Diversity of Uses

Wisbech

- 5.10 It is possible to analyse the diversity of uses in Wisbech town centre through reviewing Experian's GOAD survey of the town, which was conducted in April 2005. The survey compares the representation of convenience, comparison, and service uses (and their respective sub-sectors) to national averages, and hence it is possible to identify areas in which Wisbech may have a shortfall. Experian does not undertake GOAD surveys of the smaller centres of March, Whittlesey or Chatteris; for these centres we provide an assessment of the diversity of uses based on our empirical observations.
- 5.11 Table 2 of Appendix 3 benchmarks the diversity of uses in Wisbech town centre (GOAD definition) against national averages. The town centre contains 13 convenience outlets³¹, which equates to 5.3 per cent of the total units compared to the GB average of 9.4 per cent³². There are no greengrocers or fishmongers in the town centre, and the only main supermarket in the centre is the Somerfield store in the Horsefair Shopping Centre although the relative lack of supermarkets is not unexpected given the centre's historic nature. The town centre does, however, have representation in the majority of the convenience sub-sectors, with two bakers, three butchers, five grocery and frozen food stores, and three confectioners/tobacconists/newsagents. There is also a relatively new Aldi store in an edge-of-centre location. In overall terms, despite the under-representation in certain sub-sectors, the town centre appears to have a reasonably healthy convenience retail offer.
- 5.12 Table 2 of Appendix 3 also demonstrates that the 117 comparison goods outlets in the town centre equate to 47.6 per cent of the total units, which is only marginally below the GB average of 48.2 per cent. The town is under-represented in a number of sub-

³⁰ Table 1 of Appendix 3 compares the rankings of the comparator centres: Cambridge, King's Lynn and Peterborough are classified by MHE as 'Regional' centres; Bury St Edmunds is classified as 'Sub-Regional'; Huntingdon as 'Major District'; Diss, Ely, Haverhill, March, Newmarket, St Neots, Stowmarket, Thetford and Wisbech as 'District'; and St Ives as 'Minor District'.

³¹ Subsequent to the GOAD survey of April 2005, the Iceland store in the town centre has closed (the unit is now occupied by Poundland), although in numerical terms this has been replaced by Aldi.

³² Some caution should be exercised in comparing Wisbech's performance in relation to Experian's 'GB average' figures, which are derived by taking the average from all the centres that are surveyed by Experian, including city centres and large town centres. Thus, the 'GB average' is not simply the average for town centres.

sectors, in particular clothing; *'men's and boys' wear'* accounts for just 0.8 per cent of total town centre units, compared to the GB average of 1.4 per cent, and *'women's, girls, children's'* clothing - a key indicator of the strength of a retail centre - accounts for 4.5 per cent of total town centre units, the GB average being 5.5 per cent. Table 5.1 demonstrates that Wisbech's retail offer in this sub-sector compared to the similar-ranking centre of Ely, whose offer in the *'women's, girls, children's'* clothing sub-sector is above the national average, albeit only slightly.

Table 5.1 Representation in the 'Women's, Girls, and Children's Clothing' Sub-Sector, Wisbech and Ely

| Town Centre* | Proportion of Total Outlets (GB Average = 5.48%) | Index (GB = 100) |
|--------------|---|------------------|
| Wisbech | 4.47% | 82 |
| Ely | 5.68% | 104 |

* GOAD definitions

5.13 Two other key sub-sectors are significantly under-represented in relation to the GB average. Outlets in the *'DIY, hardware & household goods'* and *'jewellery, clocks and repair'* sub-sectors make up 2.0 per cent and 0.8 of total units, respectively, compared to GB averages of 3.1 per cent and 2.3 per cent, respectively. Wisbech town centre has noticeable above-average representation in the *'charity goods, pets and other comparison'* and *'furniture, carpets and textiles'* sub-sectors, which represent 5.3 per cent and 6.1 per cent of the total town centre units, respectively, against the GB averages of 3.8 per cent and 4.7 per cent.

5.14 The overall proportion of service outlets in Wisbech town centre (32.1 per cent) is slightly above the GB average (30.3 per cent). Of particular note is the high representation of *'estate agents & auctioneers'*, the 16 outlets in this sub-sector equating to 6.5 per cent of all town centre units, almost double the GB average of 3.4 per cent. The 24 units in the *'restaurants, cafes, coffee bars, fast food & take-aways'* sub-sector equate to 9.8 per cent of total units, which is notably below the GB average of 12.5 per cent.

March

5.15 March is a smaller centre than Wisbech and operates at a lower level in the retail hierarchy. As such, March has a narrower range of comparison retail outlets than its larger counterpart, with the comparison offer in March largely confined to independent operators. This is, however, not untypical for medium-sized market towns. Indeed, some of the independent retailers in March (such as Marshalls) are long-standing names and are considered to be an asset to the town. An auction is also held every Wednesday, which brings people into the town centre.

5.16 The convenience sector offer in March is very healthy, with a good range of supermarkets present as well as a number of smaller convenience outlets (bakers, and so on). We cover this in greater detail under the heading 'Presence of National Multiples and High Profile Retailers'.

5.17 March boasts a number of renowned restaurants, including that at the Oliver Cromwell Hotel and the Plate & Porter at Station Road (although this is outside of the town centre). Several public houses in the town centre also serve food.

5.18 Overall, we conclude that the diversity of uses in March is consistent with the centre's status in the retail hierarchy.

Whittlesey and Chatteris

5.19 Whittlesey and Chatteris each serve predominantly localised convenience retail and service needs. Whittlesey is the larger of the two centres and contains a range of banks and building societies, as well as a Costcutter convenience store and two small

supermarkets (Kwik Save and Somerfield). Comparison sector outlets in Whittlesey consist exclusively of small-scale independent operators. A development scheme is currently under construction to the immediate north of the centre at Syers Lane, which will provide a new NHS surgery and pharmacy.

- 5.20 The comparison offer in Chatteris is also confined exclusively to local independent retailers. Chatteris does, however, contain several hotels and the centre has a good range of pubs/bars and restaurants, indicating that the centre serves a dual tourism/local service centre role.

Indicator 3: Presence of National Multiples and High Profile Retailers

- 5.21 The majority of the national multiples that are present in Fenland District's town centres are located in Wisbech. March has a considerably smaller range of national multiples, most of which are in the convenience and service sectors. Whittlesey and Chatteris have a very limited representation from national multiples, and principally offer service functions together with some small scale convenience retail.

Wisbech

- 5.22 Wisbech has a reasonable representation from national retailers. The town centre's convenience offer is limited, with just two national multiples present in the town centre following the closure of the Iceland store in October 2005 - Somerfield and Julian Graves. However this is not unexpected given the physical characteristics of the town centre, and the town as a whole is also served by Aldi, Tesco, Asda and Rainbow foodstores. Wisbech town centre has the broadest range of comparison multiples of the four study centres with 26 in total, including a sizeable Woolworths store in Market Place, and small branches of a number of comparison multiples in the Horsefair Centre including Argos, Boots, Peacocks and Superdrug. Additionally there is a strong representation from service-sector multiples (such as banks, fast food outlets and travel agents), with 19 in total³³. The relatively high number may be explained by the fact that the town has a separate concentration of major banks/financial and professional services north of the River Nene around North Brink and Old Market, away from the primary shopping area which is focused on Market Place and the Horsefair Centre.
- 5.23 The depth and breadth of representation of national multiple clothing retailers can be seen as an accurate benchmark of a centre's retail offer. There are 12 national clothing multiples present in Wisbech town centre, therefore making up almost 50 per cent of the total comparison goods offer. However, all of these outlets fall within the 'middle' (25 per cent of the national clothing multiples retail offer), 'lower-middle' (33 per cent), or 'lower' (42 per cent) parts of the retail spectrum (as defined by MHE's 2003/04 'Shopping Index'). There is a limited number of young/teen fashion outlets, for example small branches of Burton and New Look; however, the town lacks higher-profile fashion retailers such as Next and River Island.

³³ National convenience multiples present in Wisbech are Iceland [now closed*], Aldi* Julian Graves and Somerfield. National comparison multiples present in Wisbech are Argos, B'Wise, Blockbuster, Bon Marche, Boots the Chemist, Boots Opticians, Burton, Card Warehouse, Clarks, Clinton Cards, Dollond & Aitchison, Dorothy Perkins, Evans, H Samuel, Mackays, New Look, Peacocks, Poundland*, Savers, Shoe Zone, Specsavers Opticians, Stead & Simpson, Superdrug, WH Smith, Westgate Co-Op (Department Store) and Woolworths. National service retailers present in Wisbech are Abbey, Alliance & Leicester, Barclays, Going Places, HSBC, Halifax, Johnsons, KFC, Lloyds TSB (2 branches), NatWest (2 branches), Nationwide, Norwich & Peterborough Building Society, Swindon, The Post Office (2 branches), Thomson and Travelcare.

Source: Experian GOAD Survey (April 2005) except supplementary updates for stores marked *.

March

- 5.24 March is represented by significantly fewer national multiples than Wisbech³⁴. March town centre is well served by convenience stores however, with a Somerfield, Tesco Express, and a large Sainsbury's all within the town centre, together with a Lidl store in an edge-of-centre location. This is in addition to the Tesco store at the Hostmoor Trading Park, approximately two miles from the town centre.
- 5.25 There is, nevertheless, very little representation from national comparison multiples in the town, with the principle retailers including Woolworths Local, Boots and Superdrug. Service sector multiples have a reasonable presence in the town, principally from banks and building societies. MHE's Shopping Index lists March as having three fashion retailers, with one each falling under the 'middle', 'lower-middle' and 'lower' categories. Therefore neither Wisbech nor March has any representation in the 'luxury', 'upper', or 'upper-middle' categories, although this is not unexpected given the size and function of the centre.
- 5.26 Both Wisbech and March have small branches of the Westgate Co-Op Department Store. However these stores appear to be slightly outmoded and are detached from the main concentration of retail activity in both centres.

Whittlesey and Chatteris

- 5.27 As we have already highlighted, Whittlesey³⁵ and Chatteris³⁶ each contain substantially fewer national multiples than Wisbech and March, as would be expected given their relatively small size and, in the case of Whittlesey, its close proximity to Peterborough city centre. Both towns' national multiples offer is restricted to a mixture of convenience stores (principally Somerfield, which is represented in both towns, and Kwik Save in Whittlesey), and a number of service sector multiples, chiefly banks and building societies. Whittlesey in particular has a surprisingly high number of banks and building societies for a town of its size, at five in total, affirming its role as a local service centre rather than a main retail destination. There are no national comparison multiples in either Whittlesey or Chatteris except chemists and a cards retailer.

Indicator 4: The Retail Property Offer in Wisbech and March

- 5.28 Analysis of the most recent FOCUS listings of June 2006 shows that the mean sales area requirement for comparison retailers for Wisbech is around 1,950 sq.ft³⁷ (181 sq.m), or 2,156 sq.ft (200 sq.m) if the smallest requirement (O₂, 300 sq.m) is stripped out. For March, the mean sales area requirement is noticeably higher, at 3,357 sq.ft (312 sq.m). This figure is due to March having a requirement by Peacocks, which is seeking units of between 5,000 and 15,000 sq.ft; this figure serves to significantly skew the results as the other six retailers on the list have much smaller requirements. If Peacocks' requirement is removed, the mean requirement for March is 2,250 sq.ft (209 sq.m). Taking this into account, mean figures for Wisbech and March are therefore similar. No national retailers have requirements for Whittlesey or Chatteris, hence desired floorspace figures for these towns cannot be calculated.

³⁴ National convenience multiples present in March are Sainsburys, Somerfield and Tesco Express. National comparison multiples present in March are Birthdays, Boots, Clarks, Curry's, M&Co (Mackays), Stead & Simpson, Superdrug, Westgate Co-Op (Department Store), Woolworth's Local and Yours. National service sector outlets present in March are Alliance & Leicester, Barclays, HSBC, Johnsons, Lloyds TSB (2 branches), Nationwide, NatWest, Norwich & Peterborough, and the Post Office.

³⁵ National convenience multiples in Whittlesey are Costcutter, Kwik Save and Somerfield. National comparison multiples in Whittlesey are Alliance Pharmacy, Cardfair and Vantage Pharmacy. National service multiples in Whittlesey are Barclays, Lloyds TSB, Nationwide, Nat West, Norwich & Peterborough Building Society and the Post Office.

³⁶ National convenience multiples in Chatteris are Mace and Somerfield. The only comparison multiple in Chatteris is Lloyds Pharmacy. National service multiples in Chatteris are Barclays, Lloyds TSB, the Post Office and Woolwich.

³⁷ Figures are derived from obtaining the median floorspace requirement for each operator and calculating the mean of these figures.

- 5.29 Our analysis of Experian's GOAD data for Wisbech³⁸ indicates that the 117 existing units within Wisbech town centre (GOAD definition) that are occupied by comparison retailers have an 'average' gross floorspace of around 1,520 sq.ft (140 sq.m), which translates to an 'average' net sales area of approximately 1,060 sq.ft (98 sq.m)³⁹. Over half of the town's comparison retail units (67 from the total of 117) are within the 0-1,000 sq.ft (gross) size band and a further 33 units fall within the 1,000-2,000 sq.ft (gross) bracket. There is, therefore, a noticeable absence of larger comparison units in the town centre, with just 14 units of between 2,000 and 10,000 sq.ft (gross) floorspace and only three comparison retail units larger than 10,000 sq.ft⁴⁰.
- 5.30 The 30 available (vacant) units within Wisbech town centre are slightly smaller, offering an average gross floorspace of around 1,400 sq.ft (130 sq.m). Almost two-thirds of the vacant units fall within the 0-1,000 sq.ft (gross) size band, with eight units between 1,000 and 2,000 sq.ft. There are three larger units of significant size ranging between 2,000 and 10,000 sq.ft (gross), however, two of these are some distance away from the primary retail area⁴¹. There are no vacant units upwards of 10,000 sq.ft (gross) in the town.
- 5.31 Therefore, when comparing the mean sales area requirement for Wisbech (2,156 sq.ft) to the availability of vacant units, of which 90 per cent are under 2,000 sq.ft (and a significant majority of these under 1,000 sq.ft), it can be seen that the typically small units in Wisbech town centre are not, in the most part, suited to the floorspace requirements of modern comparison retailers. Whilst the absence of data on the size of units in March prevents us from providing similar analysis for March, it is clear from empirical observation that the units in March town centre are also typically small.

Indicator 5: Retailer Demand

- 5.32 The commercial organisation, FOCUS, collects data on documented retailer requirements, and publishes the data twice-yearly. FOCUS also produces Town Reports (which enable the charting of retailing data including the history of the number of retail requirements for the town to be analysed) for large centres, although Wisbech is the only Fenland centre for which a Town Report is available. It is, however, possible to interrogate the FOCUS database to identify the most recent retailer requirements listing for March, Whittlesey and Chatteris, although given their small size there are currently no published requirements for either Whittlesey or Chatteris, where agents confirmed that any interest is likely to be confined to local, independent operators.
- 5.33 It is worth emphasising from the outset that the level of demand for any centre is always influenced by whether any new development is proposed; hence if a major new development scheme was to emerge, the number of requirements would be expected to show a noticeable increase (although this is less applicable to Whittlesey or Chatteris).
- 5.34 In the context described above we therefore confine our analysis under this indicator to Wisbech and March town centres.
- 5.35 FOCUS's most recent Town Report for Wisbech (June 2006) shows that the number of published retailer requirements for the town has noticeably increased recently - indeed at October 2005 (the latest available published data) the number of requirements was

³⁸ Experian GOAD data is not available for March, Whittlesey or Chatteris.

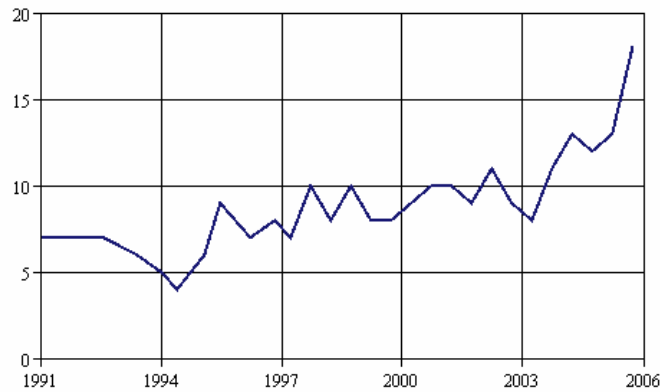
³⁹ The average sales floorspace is derived by applying a gross to net ratio of 70 per cent.

⁴⁰ The three units with gross floorspace above 10,000 sq.ft in Wisbech are Woolworth's (Market Place), with a gross floorspace of 10,800 sq.ft (1,000 sq.m); Argos (Horsefair Centre), with a gross floorspace of 11,600 sq.ft (1,070 sq.m) and Westgate Co-Op Department Store, with a gross floorspace of 23,900 sq.ft (2,220 sq.m).

⁴¹ The three vacant units with gross floorspace between 2,000 and 10,000 sq.ft in Wisbech are at Nene Quay, with a gross floorspace of 4,500 sq.m (420 sq.m), Orange Grove, with a gross floorspace of 5,700 sq.m (530 sq.m) and Church Terrace, with a gross floorspace of 8,800 sq.ft (810 sq.m).

18, the highest recorded for the town since monitoring began in 1991, and an improvement even on April 2005, when 13 requirements were listed.

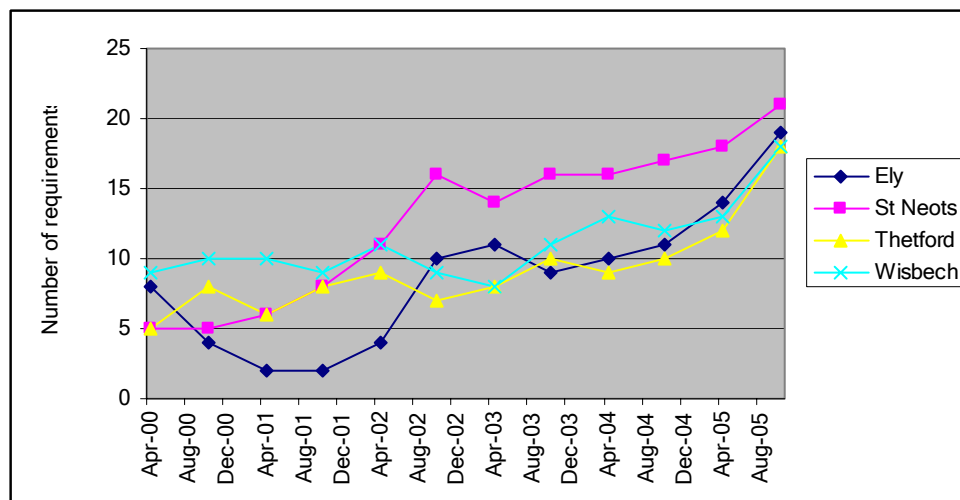
Figure 5.1 Change in the Number of Retailer Requirements (Wisbech), 1991-2006



Source: FOCUS, June 2006

- 5.36 The FOCUS requirements for Wisbech number 17 at the time of enquiry (May 2006). The requirements include two mobile 'phone retailers (O2 and Phones4U), a number of restaurant chains (Ask Central, Pizza Hut, Pizza Express and Zizzi), a fast food chain (KFC), and household stores (Instore, Ponden Mill). There is only one clothes retailer on the list, however - Ethel Austin, which operates towards the lower end of the retail spectrum. No middle-order retailers such as Next and River Island are reported to be seeking space in the town, and there is also an absence of requirements from fashion retailers catering for young persons.
- 5.37 There are fewer requirements for March than for Wisbech. Of the 11 requirements for March at May 2006, there is some overlap with retailers having dual requirements for Wisbech and March, with Card Warehouse, Ethel Austin, Edinburgh Woollen Mill and Pizza Express having requirements for both towns. The remaining seven requirements include two lower-end shoe retailers (Priceless Shoes and Shoe Zone), a frozen foods retailer (Farmfoods) and a public house chain (JD Wetherspoon). Peacocks, which like Ethel Austin is a clothes retailer operating at the budget end of the market, also has a requirement for March. As with Wisbech, therefore, there is an absence of middle-order fashion retailers with requirements for March, although this is not untypical for centres of its size and function.
- 5.38 Table 3 of Appendix 3 charts the number of requirements for Wisbech and the 13 comparator centres since October 2003. As would be expected, there is a significantly higher number of requirements for the higher-order centres, with Cambridge having 203 requirements in October 2005, and Peterborough 100. Bury St Edmunds has a large number of requirements, at 68, notably more than King's Lynn (39), which ranks higher than Bury St Edmunds in the MHE Index.
- 5.39 Huntingdon and Newmarket both have a sizeable number of requirements at 36 and 33, respectively. The 18 requirements for Wisbech at October 2005 represents the historic peak for the town, and places Wisbech alongside St Neots (21), Ely (19) and Thetford (18). The latter two centres in particular have each experienced considerable increases in the number of requirements since April 2005, reflecting the trend in Wisbech.

Figure 5.2 Change in the Number of Retailer Requirements for the Similar-Ranking Centres of Ely, St Neots, Thetford and Wisbech, April 2000 to October 2005



Source: FOCUS Town Reports, June 2006

- 5.40 We contacted the agents acting for 16 of the most prominent operators named on the FOCUS lists for Wisbech and March⁴², with a view to establishing their level of interest in the towns as investment locations. Of the operators contacted, seven had a requirement for Wisbech, five had a requirement for March, and four had a requirement for both towns. We also contacted a further 27 operators⁴³ not currently listed with FOCUS to establish whether they had any potential interest in any of the centres in Fenland District.
- 5.41 Despite following up the initial questionnaire by telephone, we received only two completed questionnaires from the FOCUS-listed operators. Farmfoods, which is already trading in Wisbech, confirmed that it might be interested in March - for a store of 5,000 to 6,000 sq.ft gross - although it would not consider Whittlesey or Chatteris because of their size. Edinburgh Woollen Mills (EWM) stated that the demographics in Wisbech and March 'appear to be favourable although both towns are borderline.' EWM would require a gross sales area of between 1,500 and 3,000 sq.ft, although it would prefer to be located in Peterborough and would not consider Whittlesey or Chatteris.
- 5.42 Furthermore, a number of operators currently not listed with FOCUS highlighted that they have a potential requirement for stores in Fenland, including a retailer of sports goods; a variety store; a bulky DIY retailer; two national supermarket chains; a computer game shop; and a drugstore. With the exception of the drugstore - which is interested only in March - all of the operators are interested in Wisbech. The variety store operator stated that it would also consider March and Chatteris, and one of the supermarket operators is also interested in Whittlesey and Chatteris.

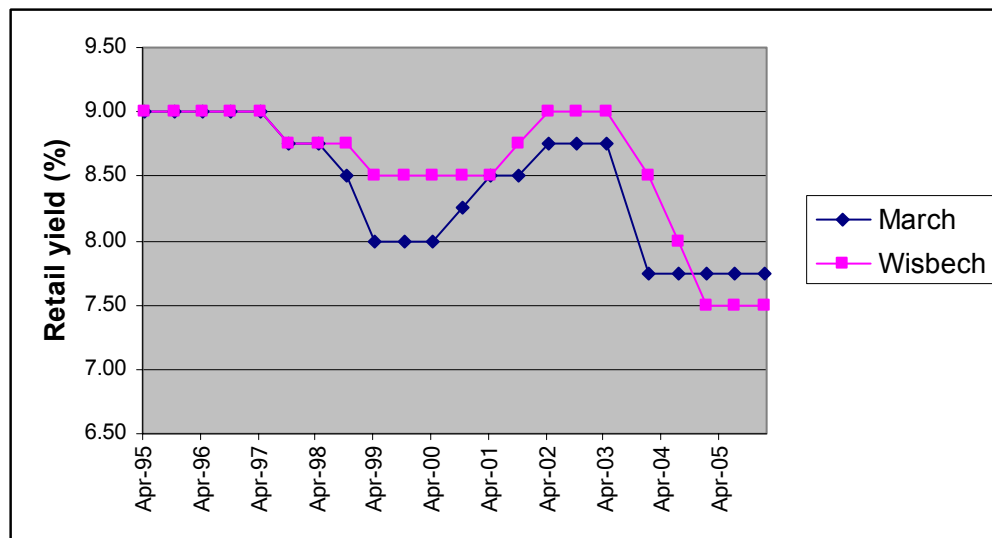
⁴² The FOCUS requirements that we followed up are: Ask Central, Card Warehouse, Edinburgh Woollen Mill, Ethel Austin, Farmfoods, Holland & Barrett, Instore, JD Wetherspoon, O2, Peacocks, Pizza Express, Pizza Hut, Ponden Mill, Priceless Shoes, The Works and Zizzi.

⁴³ The additional retailers that we contacted are: Aldi, Argos, Asda, B&Q, Bay Trading Co, Comet, Dorothy Perkins, Evans, GAME, Gamestation, Lidl, Music Zone, Netto, Next, Primark, Sainsbury's, Savers, Sports Soccer, Tesco, TJ Hughes, TK Maxx, Top Shop, WHSmith, Wickes, Wilkinson, WM Morrison and Yates Group. Some of these retailers already trade in one or more centres in Fenland District and questionnaires were tailored accordingly.

Indicator 6: Retail Yields

- 5.43 Figure 1 in Appendix 3 illustrates the ten-year trend for prime yield⁴⁴ in Wisbech and March, together with the 13 comparator centres.
- 5.44 As would be expected given their higher-order status, Peterborough and Cambridge have the best (lowest) current prime yields, at 5.0 and 5.25 per cent respectively, figures which have been static since October 1995 (Peterborough) and October 2000 (Cambridge). King’s Lynn, which is also a sub-regional centre, has a considerably weaker yield at 7.0 per cent, a figure which is bettered by some of the sub-region’s smaller centres. Newmarket, for instance, has a current prime yield of 6.75 per cent. The majority of the comparator centres that rank at a similar level in the sub-regional retail hierarchy to Wisbech and March have a prime yield of between 7.0 and 8.0 per cent, the exception being Ely which has the keenest yield of 6.0 per cent.
- 5.45 Whilst yields in Wisbech remained at or around 9.0 per cent between April 1995 and April 2003, the subsequent 1.5 percentage point reduction to the current (January 2006) level of 7.5 per cent represents the joint-best performance of the 15 centres that we assessed under this indicator (the other centre being Ely). The current yield in Wisbech is now only slightly below the yield currently achieved in King’s Lynn, which is a considerably higher-order centre.
- 5.46 As Figure 5.3 demonstrates, yields in March have followed a very similar trajectory, improving from 9.0 percent in April 1995 to 8.75 per cent in April 2003, and again to the current level of 7.75 per cent. This equates to an overall improvement of 1.25 percentage points over the 11-year period examined, which along with Stowmarket represents the joint second-best performance of the centres under consideration.

Figure 5.3 Change in Prime Retail Yields for Wisbech and March, April 1995-Jan 2006



Source: Property Market Report, Valuation Office (January 2006)

Indicator 7: Changes in Prime Zone A Shopping Rents

- 5.47 Figures 2 and 3 in Appendix 3 chart the movement in Zone A retail rents in Wisbech in terms of absolute movement and percentage change, together with 11 of the 13 comparator centres⁴⁵, from 1997 to 2005. Published data are only available for

⁴⁴ Yield is a measure of the confidence of investors in the long term profitability of the town centre for retail and other commercial developments; the lower the yield, the greater the level of investment confidence.

⁴⁵ No published rental data are available for St Ives or Stowmarket.

Wisbech from 2003 onwards, and no published data are available for March, Whittlesey or Chatteris.

- 5.48 Figure 2 shows that, as would be expected, absolute Zone A rents in 2005 were highest in the highest-ranking comparator centres of Cambridge (£240 per sq.ft) and Peterborough (£210 per sq.ft). The sub-regional centres of Bury St Edmunds and King's Lynn command the next-highest Zone A rents, at £105 per sq.ft and £85 per sq.ft, respectively.
- 5.49 Four lower-ranking comparator centres - Diss, Haverhill, St Neots and Thetford - currently command higher rents than Wisbech. More positively, the 33 per cent rental increase experienced in Wisbech between 2003 and 2005 represents the best performance of the comparator centres, albeit this improvement was from a low absolute base of £30 per sq.ft, and absolute rents remain low in Wisbech, at £40 per sq.ft.
- 5.50 Anecdotal evidence provided by locally active retail property market agents indicates that the 'best achieved' retail rents in Wisbech and March town centre are around £45 per sq.ft Zone A, and around £20-22 per sq.ft in Whittlesey. The agents were not able to provide data for the smaller centre of Chatteris.

Indicator 8: Proportion of Vacant Street Level Property

- 5.51 Wisbech town centre⁴⁶ contained 30 vacant units at the time of the last GOAD survey (April 2005), which equates to 12.2 per cent of all town centre units. This compares slightly unfavourably with the national average of 10.6 per cent. When we visited the town centre in May 2006 there were several concentrations of vacant units, at High Street, Church Terrace, Norfolk Street, and the entrance to the Horsefair Shopping Centre. Nene Quay also contains several vacant and boarded up units, including a former hotel.
- 5.52 In the absence of GOAD surveys for March, Whittlesey or Chatteris, it is therefore not possible to compare vacancy rates alongside national averages in these towns. Site visits to the towns instead offer an indication of the current vacancy levels in each town.
- 5.53 March has very low vacancy rates; indeed only two notable vacant units were identified at the time of our visit - a former job centre (which falls within the primary shopping frontage) and the former frozen foodstore - both of which are located at Dartford Road and moderately sized. Whittlesey also has two substantial vacant buildings in the town centre (the George Hotel and the former Post Office). The overall vacancy rate appeared to be low in Chatteris.

Indicator 9: Pedestrian Flows

- 5.54 We are not aware of any formal pedestrian flow counts that have been undertaken recently in any of the study centres. From our visits to the towns we were able to observe pedestrian flow, and where it was at its strongest. The principle generators of footfall tend to be larger multiple traders, and in particular fashion and variety stores. The secondary streets in a shopping centre also tend to lead off from the prime circuit, and depend on the footfall generated by the primary pedestrian flow.
- 5.55 Both Wisbech and March have clear distinct primary shopping areas where footfall is noticeably higher. In Wisbech, the highest footfall is apparent in the Horsefair Shopping Centre (particularly as the Centre contains the bus station and the Somerfield store), the northern half of the Market Place (where Woolworths, at the junction of Market Place and High Street, acts the other principle 'anchor' store) and High Street. Secondary areas, and the southern half of the Market Place, are somewhat quieter.

⁴⁶ GOAD definition

- 5.56 In March, Broad Street acts as the 'focus' of the town centre, and is where footfall appears to be at its highest, due to the presence of the majority of the town centre's (few) national multiple comparison retailers. Footfall was also high along High Street and southwards to the Market Place due to the weekly market being held, and remained steady as far as the Somerfield store. Again the secondary areas in March were considerably quieter, as would be expected.
- 5.57 Whittlesey and Chatteris naturally have much lower pedestrian flows due to the more limited roles they perform and localised catchments that they serve. Pedestrian flows in the primary areas (Market Street and High Causeway in Whittlesey, and Market Hill in Chatteris) were generally low at the time of our visits.

Summary of the Retail Performance of Fenland District's Market Towns

Wisbech

- 5.58 Wisbech town centre performs well in relation to some of the nine key indicators of vitality and viability that we assessed, and moderately well or poorly in relation to others.
- 5.59 Starting with the negatives, the overall convenience sector representation in Wisbech is under-represented in relation to the national average, albeit the town as a whole is adequately served by the out-of-centre Asda and Tesco stores, and the town centre does have representation in most convenience sub-sectors. Whilst in overall terms the proportion of comparison outlets in the town centre broadly mirrors the national average, there is some under-representation in certain key sub-sectors, including fashion. There also appears to be some room for enhancement of the centre's food and drink offer.
- 5.60 Also of concern is the above-average proportion of vacant units in the town centre, and the presence of a number of long-term vacant units. Furthermore, the available units in the town centre are unsuited to the operational requirements of modern retailers, in terms of size and configuration.
- 5.61 Wisbech has performed moderately well in relation to the retail rents and retail rankings indicators. Whilst four lower-ranking comparator centres currently command higher rents than Wisbech, the 33 per cent rental increase experienced in Wisbech between 2003 and 2005 represents the best performance of the comparator centres, albeit this improvement was from a low absolute base and absolute rents remain low in Wisbech. Similarly, whilst Wisbech has experienced some recent slippage in the retail rankings, some similar-sized centres has also experienced negative movements, although other centres such as Huntingdon and Ely have improved their rankings over the same period.
- 5.62 More positively, there is a reasonably extensive mix of comparison sector outlets in the town centre, although as we have highlighted there is room for improvement in certain key sub-sectors. The current number of published retailer requirements represents the historic peak, and research undertaken during the course of this study has identified a range of other prominent retail operators that also have an interest in being represented in Wisbech. Furthermore, retail yields have recently improved significantly, with the 1.5 percentage point improvement in Wisbech representing the joint-best performance of the 15 centres that we assessed.
- 5.63 The town centre is busy and presents an attractive environment. The architectural quality is generally of a high standard, reflecting the town centre's conservation area status. In passing, we understand that there is some talk of re-introducing car parking to Market Place, in order to enhance the vitality of the town centre. However, whilst some market towns function successfully with similar parking arrangements, in other locations, parking in central area has had a negative effect, with vehicular-pedestrian

conflict commonly cited as an issue. We would therefore advise that any firm proposals should be evaluated carefully.

- 5.64 Overall, we conclude that Wisbech is generally a vital and viable town centre, although there is room for improvement, particularly in relation to filling void units and bolstering the centre's fashion sector representation.

March

- 5.65 March town centre performs well in relation to most key performance indicators for which data are available. Whilst the centre contains few national multiple comparison operators, this is not untypical for centres of the size and function of March. The town centre is well served by convenience retailers, and has a broad range of independent retailers as well as service uses and other amenities.
- 5.66 The centre is busy and physically attractive - being a conservation area - and contains very few vacant units. There is a good level of demand for representation in March from a range of prominent retail operators, including national multiple clothes retailers, the introduction of which would significantly enhance the centre's offer. At present, however, there are few available units available in appropriate locations that are of a suitable size to meet this operator demand.
- 5.67 As with Wisbech, retail yields in March have improved significantly in recent years. Of particular note is the substantial recent improvement that March experienced in the retail rankings, the 105-place climb representing the best performance of all comparator centres.
- 5.68 Our overall conclusion is that March is a healthy and vibrant centre. Providing units of the right size and configuration to meet the good levels of operator demand would consolidate this position.

Whittlesey and Chatteris

- 5.69 Whittlesey and Chatteris both function as local service centres as opposed to main retail destinations. The presence of two vacant buildings at Market Place in Whittlesey town centre - namely the former George Hotel and Post Office - is a cause of concern, although this location is not within the core shopping area. Furthermore, whilst Whittlesey does contain a few more vacant units than would be desirable, most of these are not within the core shopping area⁴⁷, and some recently vacated units are already being redeveloped.
- 5.70 Chatteris has a low overall vacancy rate and the presence of a range of hotels and food and drink outlets indicates that Chatteris functions successfully as a dual tourism/local service centre.
- 5.71 Both centres contain a range of service uses and small supermarkets, suggesting that they meet the day-to-day needs of the surrounding rural catchment reasonably well, although we acknowledge that local residents will have to travel elsewhere for their bulk and main food shopping provisions.

Town Centre Boundaries

Introduction

- 5.72 The adopted Fenland District Local Plan (1993) defines the town centre boundaries - termed 'Central Commercial Areas'⁴⁸ by the Local Plan - for each of the four market towns. Areas within each town centre boundary are defined as 'Primary Shopping

⁴⁷ Of the town centre's 12 vacant units, only three are located within High Causeway, which is the focus of retail activity in the centre.

⁴⁸ Fenland District Local Plan (1993), Policies S1, S2

Frontages⁴⁹ (PSF). Below, we provide a review of these boundaries and allocations, and make recommendations as to their revision where we consider it to be necessary.

Wisbech

- 5.73 Wisbech's town centre boundary covers an extensive area, with the northern boundary being formed by Sandyland Street and the Freedom Bridge roundabout, which merges with the eastern boundary along the A1101 Churchill Road. The boundary extends as far south as the end of Norfolk Street, before retreating along West Street and Church Terrace, from which point onwards Love Lane forms much of the southern boundary. The boundary extends as far westwards as Wisbech Grammar School, and then extends back north of the River Nene at Wisbech Bridge to cover Exchange Square and The Chase.
- 5.74 We consider that much of the town centre boundary as described above remains relevant, with no alterations necessary. However we believe that consideration should be given as to whether the area north of the A1101/B1172 - at North Street up to and including Sandyland Street - should be removed from the town centre boundary, due to there being a lack of uses in the area which can be classified as 'town centre'. The area consists in large part of non-retail units and a new Aldi store, and is comparatively isolated from the rest of the town centre, particularly the current primary retail area.
- 5.75 Fenland District Council published its 'Interim Statement of Proposed Changes' Supplementary Planning Guidance in 2001, which contained amendments to the Primary Shopping Frontages in Chatteris and Wisbech; in Wisbech, a number of allocations of PSF from the Local Plan were 'deleted', namely:
- 1-8 and 9-11 Bridge Street;
 - 1-19 (odd) and 20-34 (even) High Street;
 - 1 Nene Quay;
 - 8-10 York Row; and
 - 1-3 and 9-12 Union Street.
- 5.76 The deletion of a number of areas of Wisbech town centre previously allocated as PSFs in the Local Plan represents *'the shifting focus of the main shopping streets and to encourage a diversity of uses in the secondary areas where a higher level of vacancies exist'*⁵⁰. The deletion of the areas listed above serves to concentrate the PSFs in the town to the Horsefair Centre and Market Place, together with part of Church Terrace up to and including the Westgate Department Store. We consider that this continues to be representative of the PSF in Wisbech, and hence we do not recommend that any further alterations should be considered in this respect. However, the Somerfield store at the northern end of the Horsefair Centre is not currently included in the PSF, and we recommend that consideration should be given to extending the PSF in this location to incorporate the Somerfield store, given its status as the only major convenience store in the town centre.

March

- 5.77 The town centre boundary in March covers an extensive, elongated area stretching from Dartford Road and parts of Darthill Road and Robingoodfellows Lane to the north of the town centre, encompassing Broad Street/Grays Lane, and including a considerable length of High Street until just before the junction with Scargell's Lane, by which point the 'typical' town centre uses begin to peter out. The boundary also extends eastwards from the town centre to incorporate the Sainsbury's store on Creek Road and parts of Nene Parade. The western boundary runs more tightly behind the

⁴⁹ *Ibid*, Policy S3

⁵⁰ Fenland District Council, Interim Statement of Proposed Changes (2001), p12

rear of High Street/Acre Road. We do not see a need for any revision of the town centre boundary for March.

- 5.78 The PSF includes both sides of Broad Street, the western side of High Street (there are few retail uses on the eastern side), extending as far south as the Somerfield store before the junction with George Street. To the north, the PSF takes in the southern side of Dartford Road (between Broad Street and Brooks Road), and the northern side of Dartford Road between the junctions with Darthill Road and Creek Road, together with a limited portion of the southern side of the road, and part of Robingoodfellows Lane. Part of Nene Parade is also included in the PSF, as is Fenland Walk, which links Broad Street with the Sainsbury's store.
- 5.79 We consider that there is scope for some amendment to the PSF in March, and that consideration should be given to the deletion of a number of areas currently designated as PSF. The areas have a limited representation from comparison and convenience retail outlets, and a higher representation of service uses (such as hairdressers, travel agents, restaurants and take-aways). As such, they function to a large extent as secondary areas, due to their higher diversity of uses, and no longer fulfil the role of a primary retail area. The areas of the town centre that we believe the Council should consider deleting as PSF are as follows:
- Dartford Road (both sides) and Station Road between the junction with Robingoodfellows Lane and Creek Road/Station Road.
 - Robingoodfellows Lane (both sides); and
 - Nene Parade.

Whittlesey

- 5.80 Whittlesey's town centre boundary is essentially rectangular in shape, encompassing the main retail and service streets in the town of High Causeway, Blunts Lane, Market Street and Broad Street, together with the more residential Queen Street, and the Market Place, as well as parts of St Mary's Street and Falcon Lane. The boundary does not encompass a number of retail units on the northern side of Syers Lane, and the adjacent NHS development that is currently underway, although these units are somewhat isolated from the rest of the town centre by the A605 (Syers Lane) and we do not believe that they warrant inclusion within the town centre boundary.
- 5.81 The Local Plan designates four streets in Whittlesey town centre as PSF: Broad Street (east side), Market Street, High Causeway and Blunts Lane. There appears to be minimal concentrations of retail uses, however. The eastern side of Broad Street has a number of convenience and comparison retailers but feels somewhat isolated from the rest of the town centre and suffers from a lack of continuous frontage, with gaps between buildings and a large car park. Market Street's offer is relatively evenly split between retail and services, but does not appear to have sufficient and contiguous presence of convenience and comparison retail to warrant its designation as PSF. High Causeway/Blunts Lane appears to act as the focus for retail activity in the centre, chiefly due to the location of the main town centre supermarkets of Somerfield and Kwik Save. However, both streets also have a number of non-retail uses, together with several vacant units on High Causeway.
- 5.82 Whilst the town centre boundary in Whittlesey therefore appears to be largely accurate, consideration needs to be given to the continuing usefulness of designating areas of primary and secondary frontages in the town centre. The four streets currently with PSF designation offer too disparate a range of services and other non-retail uses to warrant designation as PSF, particularly Market Street. We believe that consideration should be given to the removal of the designation of PSFs for Whittlesey, and instead limiting definition to the town centre boundary, with no specific designation of primary and secondary shopping frontages.

Chatteris

- 5.83 The Chatteris town centre boundary is comparatively tightly drawn around the town centre, and includes parts of High Street, King Edward Road and Station Street, together with Market Hill, Park Street and East Park Street. We consider that this boundary is representative of the town centre and do not believe that any alterations are necessary.
- 5.84 The Local Plan allocates the western side of High Street and part of Market Hill as PSF. The 2001 'Interim Statement of Proposed Changes' SPG further allocated numbers 15-33 (odd) Park Street in recognition of *'the primary shopping function at the shops at the western end of Park Street'*⁵¹. As with Whittlesey, we consider that the continued designation of primary and secondary shopping frontages is not necessary, because of the small nature of the town and the mix of retail and services offer. Therefore, we recommend that the LDF should simply define the town centre boundary of Chatteris, with no specific designations of primary and secondary shopping frontages.

⁵¹ *ibid*, p12

6 CURRENT PATTERNS OF RETAIL AND LEISURE VISITS

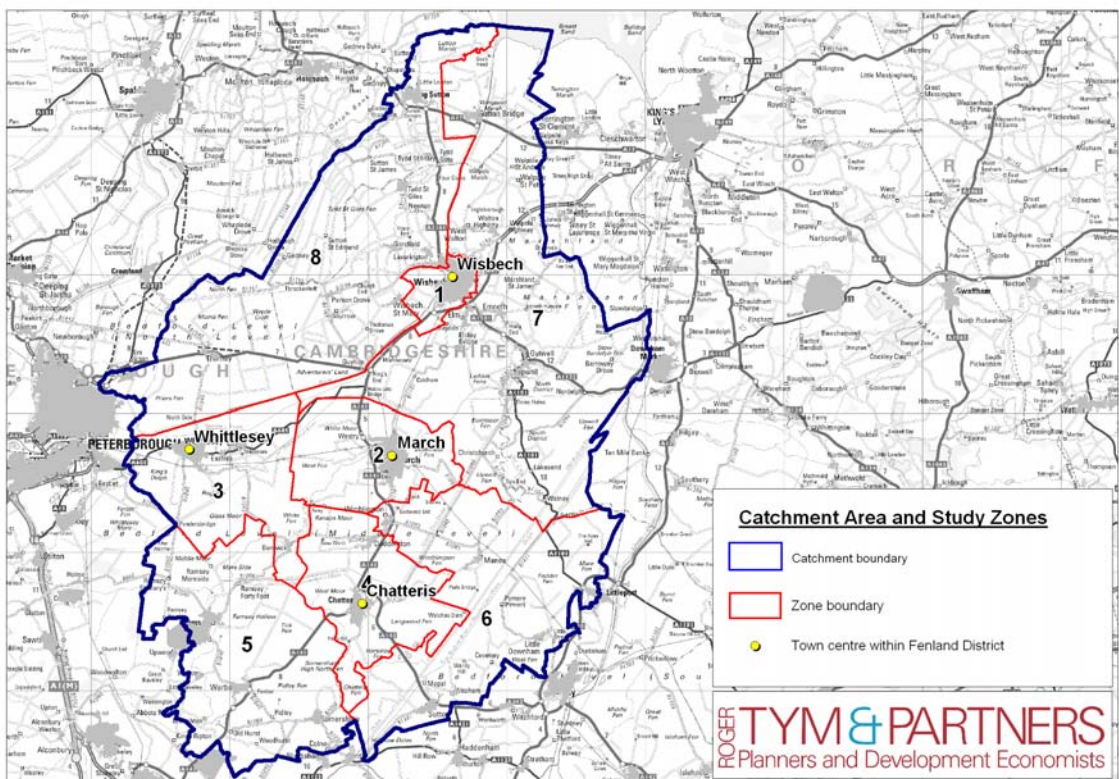
Introduction

- 6.1 This section of our report falls into two main parts. First, we provide a brief overview of the methodology that we employ to establish current patterns of convenience and comparison shopping, using the results of the survey of households. Secondly, we describe the existing patterns and destinations for various forms of retail and leisure activity.

Methodology

- 6.2 Our assessment of current patterns of convenience (food) and comparison (non-food) spending is based on a comprehensive telephone survey of 1,000 households resident in eight zones encompassing the overall catchment area (OCA) for Fenland. Whilst all of Zone 5 is outside of Fenland District, it is included so as to ensure that as much as possible of the catchments of Fenland's centres.
- 6.3 The survey was undertaken in April and May 2006 by NEMS. The findings are based on a fully representative sample, with a minimum of 95 responding households from each of the eight survey zones shown in Figure 6.1, and with all results weighted to reflect the actual distribution of households across the catchment area in the year 2003.

Figure 6.1 Expenditure Zones (Fenland Overall Catchment Area)



- 6.4 NEMS states that the 95 per cent confidence interval is plus or minus 3.2 percentage points; thus, for example, when the sample survey suggests that 36.5 per cent of responding households spend most money on clothes and shoes in Peterborough city centre, we can be 95 per cent confident that the actual proportion of the total

population who spend most on clothes and shoes in Peterborough city centre is between 33.3 per cent and 39.7 per cent (36.5 ± 3.2).

- 6.5 Many of the monetary figures given in this section of our report are to two decimal places and many of the percentages quoted are to one decimal place. However, this convention is merely to help the reader to trace the origin of figures which have been drawn from the spreadsheet tables that are presented in the separately bound Annex 2 entitled 'Retail and Leisure Capacity Spreadsheets'; we do not wish to imply a spurious level of accuracy and hence our reference to the statistical confidence level in paragraph 6.3 above.
- 6.6 The telephone survey of households sought to establish current patterns of shopping for the following types of goods:
- i) main food and groceries;
 - ii) top-up shopping for food and groceries;
 - iii) clothes and shoes;
 - iv) furniture, carpets, soft household furnishings;
 - v) DIY and decorating goods;
 - vi) domestic appliances such as fridges, cookers and other electrical goods; and
 - vii) specialist non-food items such as china, glass, books, jewellery, photographic goods, musical instruments and sports equipment.
- 6.7 The results of the two types of food and groceries expenditure (main and top-up) are then merged - through the application of a weight which reflects the estimated proportion of expenditure accounted for by each type - so as to form a composite pattern of convenience spending, expressed as market shares for each destination centre or foodstore, for each survey zone. The weights - which reflect the national market share of the large supermarket operators vis-à-vis the smaller operators and independents and our qualitative assessment of the convenience offer in Fenland's OCA - are as follows:
- | | |
|-------------------------------|----------------------|
| ▪ Main food and groceries | = 71% of expenditure |
| ▪ Top-up food and groceries | = 29% of expenditure |
| ▪ All convenience expenditure | = 100% |
- 6.8 Similarly, we have derived composite market shares in the comparison sector, in this case through the application of two weightings. The first weighting reflects the estimated proportion of expenditure accounted for by the top two spending locations - these being based on our professional judgment - and is as follows:
- | | |
|---------------------------------|----------------------|
| ▪ Top spend location | = 79% of expenditure |
| ▪ Second highest spend location | = 21% of expenditure |
| ▪ All comparison expenditure | = 100% |
- 6.9 The first procedure allows for market shares to be calculated for each of the five types of comparison purchases (as defined under paragraph 6.6). We then calculate overall composite comparison market shares through the application of a second weight to reflect the proportion of expenditure on each type of goods, as shown in Table 6.1.

Table 6.1 Second Weighting Used in the Comparison Sector - Proportion of Expenditure on Each Type of Goods

| Comparison Sub-sector | Weighting (%) |
|--|---------------|
| Clothes and shoes | 24.5 |
| Furniture, carpets, soft household furnishings | 14.2 |
| DIY and decorating goods | 4.3 |
| Domestic appliances such as fridges, cookers and other electrical goods | 14.2 |
| Specialist non-food items such as china, glass, books, jewellery, photographic goods, musical instruments and sports equipment | 42.8 |
| Total | 100 |

- 6.10 The market shares for each zone are then applied to the pot of expenditure available to the residents of each zone - which is calculated using data on population and per capita spending from MapInfo - in order to express the patterns of shopping in absolute money terms, and so allow the turnover of each centre or store to be calculated. All monetary figures are expressed in year 2003 prices because MapInfo's expenditure data use this price base.

Comparison Shopping Patterns

- 6.11 The top part of Spreadsheet CM1 sets out the 2006 population in each of the eight survey zones, the 'goods-based' per capita comparison expenditure in 2006 - which varies across the eight survey zones - and the pot of comparison expenditure available to residents in each of the survey zones in the 2006 base year. The total comparison expenditure for the 156,079 residents of the Fenland OCA amounts to £433.85m. The remainder of Spreadsheet CM1 sets out the market shares - derived from the survey of households - achieved by each of the various centres and retail parks located within and beyond Fenland's expressed as percentages.
- 6.12 Spreadsheet CM1 then converts the spending patterns to absolute money flows through the application of the percentage market share for each centre to the pot of money available to residents in each zone. Thus, Spreadsheet CM1 shows that residents of zone 1 (Wisbech town centre and outlying area) have £52.17m available to spend on comparison goods; of this total, 50.5 per cent is spent in Wisbech town centre, which equates to a money flow to Wisbech town centre of £26.33m. When the money flows to Wisbech town centre from each zone are added together, Spreadsheet CM1 shows that £67.75m of the comparison expenditure of the catchment area's residents flows to Wisbech town centre (15.6 per cent of the total pot of expenditure available).
- 6.13 The two 'Sub-total for Catchment' rows in Spreadsheet CM1, show, respectively, the proportion and absolute amount of the comparison expenditure of the catchment area's residents which is retained by centres and stores located within the catchment. These are known as the 'retention rate' and the absolute 'retention' of expenditure. The comparison sector retention rate varies from 9.1 per cent for residents of zone 6 (the area directly to the north of Ely) to 56.9 per cent for residents of zone 1 (Wisbech town centre and outlying area).
- 6.14 The total amount of catchment area residents' comparison expenditure which is retained by centres and stores within the catchment area is £122.95m. The overall retention rate for all centres and stores within the catchment is therefore 28.3 per cent (£122.95m divided by £433.85m x 100). This is a relatively low level of retention - even considering the close proximity of higher-order centres close to, but outside of, the catchment area boundary - and one that is clearly capable of improvement.
- 6.15 The remainder of the comparison expenditure of the catchment's residents flows to centres and stores located beyond the catchment; these flows are known as 'leakage'

and they amount to approximately 71.7 per cent of the overall comparison expenditure of catchment residents, or £310.90m (£433.85m total, minus retention of £122.95m).

Main Comparison Centres in the Fenland OCA

- 6.16 The survey confirms Wisbech town centre's significance as by far the most important comparison retail centre within the catchment area, with an estimated turnover of £67.75m (drawn from residents of the catchment) and an overall market share or retention rate of 15.6 per cent. The second most important comparison spend location within the catchment area is March town centre, with an estimated comparison turnover of £26.84m (6.2 per cent of the available comparison goods expenditure of catchment area residents). All other centres within the catchment area each have a composite comparison market share of less than 2 per cent (Table 6.2).

Table 6.2 Main Comparison Goods Centres Within the Fenland OCA

| | Total Comparison Turnover (£m 2003 prices) | Available Comparison Goods Expenditure within the Catchment (%) |
|------------------------|---|--|
| Wisbech town centre | 67.75 | 15.6% |
| March town centre | 26.84 | 6.2% |
| Ramsey town centre | 6.26 | 1.4% |
| Whittlesey town centre | 3.74 | 0.9% |
| Chatteris town centre | 3.63 | 0.8% |

Comparison Centres Outside of the Fenland OCA

- 6.17 The survey results indicate that some 71.7 per cent of the comparison expenditure of the catchment area's residents (equivalent to £310.90m of comparison goods spending) currently flows to centres outside the catchment area. Peterborough city centre accounts for almost half of the leakage (£140.97m), which equates to 32.5 per cent of the available comparison expenditure of catchment area residents. King's Lynn town centre accounts for a further 13.2 per cent (£57.12m) of the catchment area's available comparison expenditure, followed by Cambridge city centre (£25.25m, equating to a market share of 5.8 per cent), Ely city centre (£19.13m, equating to a market share of 4.4 per cent) and Huntingdon town centre (£18.14m, equating to a market share of 4.2 per cent).

Analysis of Shopping Patterns - Comparison Goods Sub-Sectors

- 6.18 The analysis set out above relates to composite market shares. However, it is also useful to consider shopping patterns in relation to the five individual comparison goods sub-sectors, namely clothes and shoes; furniture, carpets and soft furnishings; DIY and decorating goods; domestic appliances; and specialist items such as china, glass, books, jewellery, photographic goods, musical instruments and sport equipment.

Clothes and Shoes Sub-Sector

- 6.19 Clothes and shoes is a critically important comparison sub-sector in terms of the success or otherwise of a town centre; analysis of shopping patterns in this sub-sector is therefore of considerable utility. Table 6.3 shows that Wisbech town centre achieves the highest clothes and shoes market share in zone 1 only; even in this 'core' zone, however, Wisbech town centre accounts for just 37 per cent of residents' available clothes and shoes expenditure. This is only slightly higher than the proportion of available clothes and shoes expenditure in zone 1 that is accounted for by King's Lynn town centre (31 per cent).

Table 6.3 Clothes and Shoes Sub-sector - Market Shares of Town/City Centres by Zone

| Market Share | Town/City Centres' Overall Clothes & Shoes Market Shares by Zone | | | | | | | | |
|-------------------------------|--|--------------------|-----------------------|--------------------|-----------------------|----------------------|--------------------|--------------------|---------------------|
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | All Zones Combined |
| Highest | W'bech TC (37%) | P'boro CC (59%) | P'boro CC (64%) | P'boro CC (51%) | P'boro CC (52%) | C'bridge CC (30%) | K Lynn TC (44%) | P'boro CC (38%) | P'boro CC (40%) |
| 2nd Highest | K Lynn TC (31%) | March TC (20%) | Serp'tne Ctre (5%) | H'don TC (11%) | H'don TC (21%) | Ely CC (30%) | B'gate RP (23%) | K Lynn TC (30%) | K Lynn TC (16%) |
| 3rd Highest | P'boro CC (24%) | K Lynn TC (6%) | H'mpton TC (5%) | Ely CC (9%) | Serp'tne Ctre (6%) | P'boro CC (14%) | P'boro CC (15%) | B'gate RP (15%) | Wisbech TC (12%) |

6.20 Peterborough city centre achieves the highest clothes and shoes market share in zones 2, 3, 4, 5 and 8; Cambridge city centre is the dominant centre for clothes and shoes in zone 6; and King's Lynn town centre achieves the highest market share in zone 7.

6.21 In overall terms, Peterborough city centre achieves a clothes and shoes market share across all zones of 40 per cent, compared to Wisbech town centre and March town centre which achieve corresponding market shares of just 12 per cent and 4 per cent, respectively.

Furniture, Carpets and Soft Household Furnishings Sub-Sector

6.22 Wisbech town centre achieves the highest market share for expenditure on furniture/carpets/soft furnishings amongst residents in zones 1 and 7, and has an overall market share across the catchment of 19 per cent. However, Peterborough city centre achieves the highest overall market share for expenditure on these types of bulky goods (29 per cent). King's Lynn is also an important location for spending on furniture/carpets/soft furnishings, achieving an 11 per cent market share across the OCA as a whole (Table 6.4).

Table 6.4 Furniture/Carpets/Soft Household Furnishings Sub-sector - Market Shares of Town/City Centres by Zone

| Market Share | Town/City Centres' Overall Furniture/Carpets/Soft Household Furnishings Market Shares by Zone | | | | | | | | |
|-------------------------------|---|--------------------|---------------------|--------------------|--------------------|----------------------|--------------------|--------------------|------------------------|
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | All Zones Combined |
| Highest | W'bech TC (53%) | P'boro CC (40%) | P'boro CC (58%) | P'boro CC (32%) | P'boro CC (37%) | C'bridge CC (31%) | W'bech TC (33%) | P'boro CC (28%) | P'boro CC (29%) |
| 2nd Highest | K Lynn TC (19%) | W'bech TC (22%) | W'bech TC (9%) | H'don RP (9%) | Ram'y TC (22%) | Ely CC (17%) | K Lynn TC (27%) | K Lynn TC (24%) | Wisbech TC (19%) |
| 3rd Highest | P'boro CC (13%) | March TC (22%) | Whit'sey TC (5%) | H'don TC (9%) | H'don TC (14%) | P'boro CC (9%) | P'boro CC (8%) | W'bech TC (15%) | Kings Lynn TC (11%) |

DIY and Decorating Goods Sub-Sector

6.23 Wisbech town centre achieves the highest market share for expenditure on DIY and decorating goods amongst residents in zones 1, 7 and 8, and indeed for the OCA as a whole (Table 6.5). In zone 1, the 'core' zone, Wisbech accounts for 56 per cent of residents' available DIY and decorating goods expenditure. B&Q at Elm High Road in Wisbech also achieves high market shares from residents in zones 1, 7 and 8, attracting 21 per cent, 23 per cent and 15 per cent of available expenditure in those zones, respectively. March town centre also achieves a high market share for expenditure on this comparison sub-sector, attaining an overall market share of 12 per cent of available expenditure within the OCA.

Table 6.5 DIY and Decorating Goods Sub-sector - Market Shares of Town/City Centres by Zone

| Market Share | Town/City Centres' Overall DIY and Decorating Goods Market Shares by Zone | | | | | | | | |
|-------------------------------|---|-----------------------------|------------------------------|-----------------------------|-----------------------|----------------------|---------------------|---------------------|---------------------|
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | All Zones Combined |
| Highest | W'bech TC (56%) | March TC (58%) | P'boro CC (29%) | March TC (19%) | H'don TC (28%) | Ely CC (28%) | W'bech TC (36%) | W'bech TC (25%) | Wisbech TC (18%) |
| 2nd Highest | B&Q W'bech (21%) | March Trading Park (16%) | E. Stn Rd RP P'boro (17%) | Chat'ris TC (18%) | H'base H'don (25%) | C'bridge RP (15%) | K Lynn TC (27%) | K Lynn TC (20%) | March TC (12%) |
| 3rd Highest | K Lynn TC (7%) | P'boro CC (8%) | H'base P'boro (14%) | March Trading Park (11%) | H'don RP (16%) | March TC (14%) | B&Q W'bech (23%) | B&Q W'bech (15%) | P'boro CC (11%) |

Domestic Appliances Sub-Sector

- 6.24 Table 6.6 shows that Wisbech town centre achieves the highest market share for expenditure on domestic appliances in zone 1 only, where Wisbech accounts for 66 per cent of residents' available expenditure on domestic appliances. March town centre achieves the highest market share of domestic appliance expenditure in zone 2, and Chatteris town centre attracts the highest share of zone 4 residents' expenditure. However, for the OCA as a whole, Peterborough city centre achieves the highest market share for this type of comparison goods expenditure (26 per cent).

Table 6.6 Domestic Appliances Sub-sector - Market Shares of Town/City Centres by Zone

| Market Share | Town/City Centres' Overall Domestic Appliances Market Shares by Zone | | | | | | | | |
|-------------------------------|--|--------------------|-----------------------|----------------------|--------------------|----------------------|----------------------------|--------------------|------------------------|
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | All Zones Combined |
| Highest | W'bech TC (66%) | March TC (31%) | P'boro CC (61%) | Chat'ris TC (35%) | H'don TC (32%) | C'bridge CC (34%) | K Lynn TC (33%) | P'boro CC (27%) | P'boro CC (26%) |
| 2nd Highest | P'boro CC (10%) | P'boro CC (31%) | Whit'se y TC (14%) | P'boro CC (18%) | P'boro CC (32%) | Ely CC (29%) | W'bech TC (31%) | W'bech TC (26%) | Wisbech TC (20%) |
| 3rd Highest | K Lynn TC (8%) | W'bech TC (20%) | H'don TC (6%) | March TC (12%) | Ram'y TC (15%) | P'boro CC (8%) | B'grave RP W'bech (12%) | K Lynn TC (18%) | King's Lynn TC (9%) |

Specialist Comparison Goods Sub-Sector

- 6.25 The final comparison goods sub-sector relates to specialist non-food items such as china, glass, books, jewellery, photographic goods, musical instruments and sports equipment. Table 6.7 shows that Wisbech town centre achieves the highest specialist goods market share in zone 1 only; accounting for 50 per cent of residents' available specialist goods expenditure in this zone. Peterborough city centre achieves the highest overall market share across all zones, accounting for 35 per cent of residents' expenditure on this comparison sub-sector. Wisbech town centre only achieves a 15 per cent overall market share on specialist goods across all zones, similar to King's Lynn, which achieves a 12 per cent overall market share.

Table 6.7 Specialist Goods Sub-sector - Market Shares of Town/City Centres by Zone

| Market Share | Town/City Centres' Overall Specialist Goods Market Shares by Zone | | | | | | | | |
|-------------------------|---|--------------------|--------------------|----------------------|----------------------------|----------------------|--------------------|--------------------|---------------------|
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | All Zones Combined |
| Highest | W'bech TC (50%) | P'boro CC (47%) | P'boro CC (60%) | P'boro CC (39%) | P'boro CC (55%) | Ely CC (41%) | K Lynn TC (35%) | P'boro CC (30%) | P'boro CC (35%) |
| 2 nd Highest | K Lynn TC (23%) | March TC (35%) | W'sey TC (7%) | Ely CC (15%) | H'don TC (15%) | C'bridge CC (39%) | W'bech TC (29%) | K Lynn TC (23%) | Wisbech TC (15%) |
| 3 rd Highest | P'boro CC (17%) | W'bech TC (4%) | March TC (6%) | C'bridge CC (13%) | Peel Ctr W'bech (5%) | P'boro CC (7%) | P'boro CC (14%) | W'bech TC (18%) | K Lynn TC (12%) |

Convenience (Food and Groceries) Shopping Patterns

- 6.26 The top part of Spreadsheet CV1 of Annex 2 sets out the 2006 population in each of the eight survey zones, the per capita expenditure in 2006 - which varies across the eight survey zones - and the pot of convenience expenditure available to residents in each of the survey zones in the 2006 base year. The total convenience expenditure for the 156,079 residents of the catchment area amounts to £233.21m. The remainder of Spreadsheet CV1 sets out the market shares - derived from the survey of households - achieved by each of the various centres and stores located within and beyond the catchment area, expressed as percentages.
- 6.27 Spreadsheet Cv1 then converts the spending patterns to absolute money flows through the application of the percentage market share for each centre to the pot of money available to residents in each zone. Thus, residents of zone 1 have £29.21m available to spend on convenience goods; of this total, 42 per cent is spent in the Tesco Superstore at Sandown Road, Wisbech, which equates to a money flow to the Tesco Superstore of £12.26m. When the money flows to the Tesco Superstore at Sandown Road, Wisbech, from each zone are added together, Spreadsheet CV1 shows that £29.29m of the convenience expenditure of the residents of the Fenland OCA flows to that store.
- 6.28 The two 'Sub-total for Catchment' rows in Spreadsheet CV1 show, respectively, the proportion and absolute amount of the convenience expenditure of the catchment area's residents which is retained by centres and stores located within the catchment. As with the comparison sector, these are known as the 'retention rate' and the absolute 'retention' of expenditure. The convenience sector retention rate varies from 27.3 per cent for residents of zone 6 (the area directly to the north of Ely) to 95.9 per cent for residents of zone 2 (March town centre and outlying area). The total amount of convenience expenditure which is retained by centres and stores within the Fenland OCA is £144.93m.
- 6.29 The overall convenience sector retention rate, therefore, is about 62.1 per cent (£144.93m divided by £233.21m x 100), which is a relatively modest level of retention. The remainder of the convenience expenditure of the catchment area's residents flows to centres and stores located beyond the catchment; these flows are known as 'leakage' and they amount to approximately 37.9 per cent of the overall convenience expenditure of the catchment area's residents, or £88.27m (£233.21m total, minus retention of £144.93m).

Main Convenience Stores within the Fenland OCA

- 6.30 The survey findings show that 12.6 per cent (£29.29m) of the total convenience goods expenditure of the residents of Fenland's OCA (£233.21m) is spent in just one store within the catchment, this being the Tesco Superstore at Sandown Road, Wisbech. Two other individual foodstores located within the catchment achieve market shares of

8 per cent or greater, these being the Tesco Superstore at March Industrial Estate, March, which accounts for 10.2 per cent (£23.75m) of the available convenience goods expenditure of the catchment, and the Asda store at North End, Wisbech, which accounts for a further 8.2 per cent (£19.21m).

- 6.31 The three stores named above, together with a further four stores within the catchment area, together account for over 45 per cent of the convenience expenditure of the catchment's residents. The findings are set out in Table 6.8.

Table 6.8 Main Convenience Stores within the Fenland OCA

| | Estimate* of Total Convenience Turnover £m (2003 Prices) | Available Convenience Goods Expenditure within the Catchment (%) |
|--|---|---|
| Tesco Superstore, Sandown Road, Wisbech | 29.29 | 12.6% |
| Tesco Superstore, March Industrial Estate, March | 23.75 | 10.2% |
| Asda, North End, Wisbech | 19.20 | 8.2% |
| Sainsbury's, Mill View, March | 13.26 | 5.7% |
| Co-op, Rainbow Store, Newtown Road, Huntingdon | 10.21 | 4.4% |
| Somerfield, Horse Fair, Wisbech | 8.08 | 3.5% |
| Somerfield, Blunts Lane, Whittlesey | 6.13 | 2.6% |
| Total | 109.92 | 47.2% |

* These are estimates because the survey findings are subject to the confidence interval referred to in paragraph 6.3 and because of the weighting estimates referred to in paragraph 6.6.

Convenience Stores Outside the Fenland OCA

- 6.32 The survey results indicate that approximately 37.9 per cent of the convenience expenditure of the catchment area's residents flows to stores and centres outside the catchment. The main named destinations for households who shop in convenience stores outside the catchment are the Co-op at West Street, Spalding, which accounts for £8.39m of the expenditure that leaks from the catchment (3.6 per cent of the total convenience goods expenditure of the catchment area's residents); the Tesco at Market Place, Ely, which accounts for £7.81m of the total leakage (3.3 per cent of the total convenience goods expenditure); and the Tesco Extra at the Serpentine Green Shopping Centre, which accounts for a further £7.71m of the total leakage (3.3 per cent of the total convenience goods expenditure within the catchment).

Analysis of Convenience Market Shares by Individual Zone

- 6.33 Analysis of individual zones shows that in two zones (1 and 2), more than 90 per cent of available convenience expenditure is retained within the OCA, reflecting the availability of the Tesco, Asda and Somerfield stores in Wisbech (zone 1) and the Sainsbury's, Tesco and Somerfield stores in March (zone 2). A respectable proportion of the total convenience goods expenditure of zone 4 residents is similarly retained within the OCA (79 per cent), largely reflecting the availability of the Somerfield store in Chatteris.
- 6.34 A lower proportion of the available expenditure in zone 7 is retained within the OCA (61 per cent); however this more modest level of retention is not unexpected given the relatively close proximity of parts of zone 7 to the Co-op and Tesco stores at Spalding, and other stores in King's Lynn. Nevertheless, in all other remaining zones (3, 5, 6 and 8) the proportion of available expenditure that is retained within the OCA drops below 50 per cent. The market shares of individual foodstores in each zone are shown in Table 6.9.

Table 6.9 Convenience Sector - Market Shares of Individual Foodstores/Centres by Zone

| Market Share | Town/City Centres' Overall Convenience Market Shares by Zone | | | | | | | | |
|-------------------------------|--|---------------------------|-----------------------------------|---------------------------|---------------------------|----------------------------------|----------------------------|-----------------------------|-----------------------------|
| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | All Zones Combined |
| Highest | Tesco S'Store W'bech (42%) | Tesco S'Store March (45%) | S'field, Blunts Lane P'boro (27%) | S'field Chat'ris (30%) | Co-op H'don (27%) | Tesco Market Place Ely (31%) | Tesco S'Store W'bech (29%) | Co-Op West St Spald'g (19%) | Tesco S'Store Wisbech (13%) |
| 2nd Highest | S'field, W'bech (21%) | S'burys March (34%) | Tesco Extra Hamp'n P'boro (21%) | Tesco S'Store March (18%) | Tesco S'Store H'don (19%) | Tesco S'Store Angel Dr Ely (20%) | Asda W'bech (17%) | Tesco S'Store W'bech (16%) | Tesco S'Store March (10%) |
| 3rd Highest | Asda, W'bech (20%) | S'field, March (8%) | Tesco S'Store March (11%) | Co-Op Chat'ris (16%) | S'field H'don (14%) | Tesco S'Store March (13%) | Other K Lynn (13%) | Asda W'bech (16%) | Asda North End Wisbech (8%) |

Leisure Patterns

- 6.35 The survey of households included seven questions that asked residents within the Fenland OCA where they spent the most money on certain types of leisure activity including visits to cinemas, pubs, restaurants, health and fitness facilities, theatres or concert halls, museums and other family entertainment leisure uses such as bowling and bingo (Table 6.10).

Cinemas

- 6.36 Overall, 60 per cent of households claimed that they do not visit cinemas. Of the households that do visit cinemas, the most popular location for visits is Peterborough city centre (47 per cent), followed by Huntingdon town centre (34 per cent) and King's Lynn town centre (6 per cent). No other location was cited by more than four per cent of respondents who visit the cinema.

Pubs

- 6.37 Overall, 57 per cent of all households questioned do not visit pubs. Wisbech town centre achieves the best market share among residents that do visit pubs, and it is the main destination for pub use for residents of zone 1 (67 per cent), zone 7 (30 per cent) and zone 8 (22 per cent). As expected, the nearest main town to residents in each survey zone achieves the highest market share for pub uses. Therefore, the main location for residents in zone 2 is March town centre, the prime location for residents in zone 3 is Whittlesey town centre, and the main destination for residents in zone 4 is Chatteris town centre.

Restaurants

- 6.38 Only 28 per cent all households do not visit restaurants according to the survey. The most popular destination for residents that visit restaurants is Peterborough city centre (17 per cent), followed by Wisbech town centre (12 per cent), King's Lynn town centre (8 per cent), March town centre (8 per cent) and Huntingdon town centre (5 per cent). No other location was cited by five per cent or more of respondents who visit restaurants.

Health and Fitness

- 6.39 A high proportion of all households do not use health and fitness facilities (77 per cent). For those households that do use such facilities, Wisbech town centre is the dominant location, with an overall market share of 20 per cent, followed by March town centre

and Ramsey town centre, with market shares of 19 per cent and 15 per cent, respectively.

Family Entertainment (Bingo/Bowling)

- 6.40 Only 24 per cent of residents engage in family entertainment recreation activities, such as bingo and bowling. The dominant destination for residents that engage in family entertainment activities is Peterborough city centre, which achieves a 28 per cent overall market share, and serves as the prime location for residents in zones 3, 4, 5 and 8. Other destinations that are important for family entertainment recreation are Wisbech town centre, which is an important destination for zone 1 residents, and March town centre, which is the key location for zone 2 residents.

Theatres/Concerts

- 6.41 The household survey indicates that over sixty per cent of all households do not visit theatres or concert halls. The four main destinations for theatre/concert users are Peterborough city centre (22 per cent), London city centre (18 per cent), King's Lynn town centre (12 per cent) and Cambridge city centre (10 per cent). Peterborough city centre is the prime destination for residents in zones 2, 3, 5 and 8. London city centre is the main location for residents in zone 4, King's Lynn town centre is the most important destination for residents in zone 1 and 7, and Cambridge city centre is the key location for residents in zone 6.

Museums

- 6.42 Over two-thirds of all respondent households stated that they do not visit museums. The most popular location for residents that do visit museums is London city centre (23 per cent), followed by Cambridge city centre (11 per cent) and Wisbech town centre (8 per cent). No other location was cited by more than six per cent of respondents.

Table 6.10 Town/City Centre Where Most Money is Spent on Leisure Activities

| Survey Zone | Main Destination by Category of Leisure Pursuit | | | | | | |
|--|---|-------------------|------------------|-------------------|----------------------|-------------------|------------------|
| | Cinemas | Pubs | Restaurants | Health & Fitness | Family Entertainment | Theatres/Concerts | Museums |
| 1 | P'boro CC | Wisbech TC | Wisbech TC | Wisbech TC | Wisbech TC | K Lynn TC | Wisbech TC |
| 2 | P'boro CC | March TC | March TC | March TC | March TC | P'boro CC | London CC |
| 3 | P'boro CC | Whitt'sey TC | P'boro CC | Whitt'sey TC | P'boro CC | P'boro CC | P'boro CC |
| 4 | Hunt'don TC | Chatteris TC | Chatteris TC | March TC | P'boro CC | London CC | C'bridge CC |
| 5 | Hunt'don TC | Ramsey TC | Ramsey TC | Ramsey TC | P'boro CC | P'boro CC | London CC |
| 6 | C'bridge CC | Other | Ely TC | Ely TC | Other | C'bridge CC | C'bridge CC |
| 7 | P'boro CC | Wisbech TC | K Lynn TC | Wisbech TC | K Lynn TC | K Lynn TC | London CC |
| 8 | P'boro CC | Wisbech TC | P'boro CC | Wisbech TC | P'boro CC | P'boro CC | London CC |
| Main Spend Destination (across all zones) | P'boro CC | Wisbech TC | P'boro CC | Wisbech TC | P'boro CC | P'boro CC | London CC |

Conclusions on Retail and Leisure Spending Patterns

- 6.43 The survey of households has shown that:
- i) town centres and individual foodstores located within the Fenland OCA retain, collectively, some 62 per cent of the convenience expenditure of residents of the catchment, which is a relatively modest level of retention and one that is capable of some improvement;
 - ii) the main outflows (or leakage) of convenience expenditure to named stores are to the Co-op at West Street, Spalding, the Tesco at Market Place, Ely and the Tesco Extra at the Serpentine Green Shopping Centre, Peterborough, which respectively account for about £8.4m, £7.8m and £7.7m of the expenditure that leaks from the catchment area;
 - iii) Wisbech town centre only retains about 15.6 per cent of the overall comparison expenditure of residents of the catchment area, which is a relatively low level of retention for a centre of its status. Furthermore, March town centre only retains 6.2 per cent of the comparison expenditure of residents of the catchment area;
 - iv) the aggregate comparison retention level for all centres and stores within the catchment is about 28 per cent, which is also a low overall level of retention and one that is clearly capable of improvement;
 - v) the main outflows (or leakage) of comparison expenditure are to Peterborough city centre (£140.97m) and King's Lynn town centre (£57.12m), equating to high composite market shares of about 33 per cent and 13 per cent, respectively; and
 - vi) Wisbech town centre is the prime destination for respondents who participate in two of the seven leisure activities featured in the questionnaire, namely pub and health and fitness visits. For cinema, theatre/concert and family entertainment visits Peterborough city centre attracted the largest share of respondents, which is to be expected given its status as a sub-regional centre and the general lack of these types of leisure facilities within the Fenland OCA. However, Peterborough city centre is also the prime destination for (usually short-distance) restaurant trips, perhaps indicating that there may be a shortfall in the quantity and/or quality of such facilities within the Fenland OCA.
- 6.44 Thus, based on our performance analysis, our assessment of qualitative needs and the results of the survey of households, we consider that there is scope for the Fenland OCA to increase its market share (or retention) of comparison goods expenditure from the current base position of 28 per cent and we test for a range of scenarios in our subsequent assessment of quantitative need. In the convenience goods sector, we consider that there is also scope to substantially increase the aggregate retention level - which starts at a modest level of 62 per cent - particularly given the low localised retention rates in zones 3, 6 and 8.

7 QUANTITATIVE RETAIL CAPACITY ANALYSIS

Summary of Methodology and Data Inputs

- 7.1 The main steps in the assessment of the quantitative capacity for further retail floorspace are conceptually the same for both the comparison and convenience goods sectors. The methodology is summarised below, together with information on the various data inputs that we have used for our assessment of quantitative retail capacity:
- i) use the household survey data to establish the comparison and convenience goods spending patterns of residents of Fenland's overall catchment area (OCA) and assess the overall retention of expenditure by centres and stores located within the OCA;
 - ii) forecast the growth in the comparison and convenience goods expenditure of the OCA's residents from 2006⁵² to 2011, and from 2011 to 2016, and again from 2016 to 2021, taking account of population change and real growth, over and above inflation, in per capita spending levels;
 - iii) make a forecast of the future retention rate - the proportion of the expenditure of the OCA's residents that is spent in centres and stores located within the OCA;
 - iv) make allowances for 'claims' on retail expenditure growth, which are:
 - o the growth in 'turnover efficiency' (turnover per sq.m sales area) for existing retailers, of 2.0 per cent, per annum, for comparison retailers (this being the lower figure from Experian's 2.0 to 2.5 per cent, per annum range⁵³) and of 0.2 per cent, per annum for convenience retailers (this being the lower figure from Experian's suggested range of 0.2 to 1.2 per cent, per annum⁵⁴);
 - o our best estimate of the likely growth over time in Special Forms of Trading (SFT), of which e-tail will be of most significance; and
 - o existing commitments for retail development; and then
 - v) convert the resulting residual expenditure (that is, growth in retained expenditure, less the three 'claims' on it) to a potential sales floorspace 'capacity'.
- 7.2 Each of the data inputs is important, but the three particularly critical inputs are the rate of population change; the rate of per capita expenditure growth; and the retention rate assumption.
- #### Population Growth
- 7.3 MapInfo provided initial population data for each of the eight zones for the year 2003. The forecast level of future growth has primarily been derived from population data provided by Cambridgeshire County Council Research Group⁵⁵, which has allowed us to model population growth down to ward level. For areas lying outwith the Cambridgeshire boundary, we have used multipliers for each ward derived from population forecasts provided by the relevant local authority.
- 7.4 The population in zones 1 to 8 in each of the forecasting years 2006, 2011, 2016 and 2021 was calculated by estimating the population in each ward by rolling forward the

⁵² Per capita retail expenditure data for the OCA have been provided by MapInfo, with bespoke data provided for each of the eight survey zones.

⁵³ Experian, *Retail Planner Briefing Note 3.0* (March 2006), page 21. We have used the lower figure from Experian's suggested range because of the typically small size of retail property in Fenland.

⁵⁴ Footnote 8 on page 8 of Experian's *Retail Planner Briefing Note 2.2* (April 2005), which is reproduced as footnote 11 of *Retail Planner Briefing Note 3.0*.

⁵⁵ Local Authority Total Population Forecasts by Ward Table, Cambridgeshire County Council Research Group, June 2005.

2003 MapInfo data, and then summing together the ward populations which form each particular zone.

- 7.5 Using this method, the resident population across the entire Fenland OCA is forecast to increase from 156,079 in the 2006 base year to 178,330 in 2021. This equates to a total population increase of 14 per cent over the study period.

Per Capita Expenditure Growth Rates

- 7.6 As an alternative to projections of expenditure growth based on past trends, MapInfo has teamed up with Oxford Economics Forecasting (OEF) to produce forecasts for goods based expenditure growth in the period up to 2016, as set out in Table 2 of Information Brief 05/02. MapInfo sits on the fence and makes no recommendation as to whether the past trends projections or the OEF forecasts are to be preferred. However, we prefer the MapInfo/OEF forecasts, as opposed to their past trends projections, which MapInfo acknowledges have inherent weaknesses: *'...The projections are derived solely from past trends and take no account of current economics or future expectations. Convenience goods retail expenditure has been erratic over the last 40 years.'* In contrast, MapInfo states that the forecasts are: *'...consistent with past trends, but are also based upon expected changes in other economic variables of interest...'*
- 7.7 Accordingly, we have used goods based⁵⁶ per capita expenditure growth rates of 4.3 per cent, per annum (comparison sector) and 0.9 per cent, per annum (convenience sector), these being the forecasts for the 2004-2016 period specified in Table 2 of Information Brief 05/02 (no forecasts are provided for the period beyond 2016; in the absence of any other evidence we have applied the same growth rates over the period to 2021).

Variation of the Retention Rate

- 7.8 The other critical variable is the overall future retention rate assumption. We present the findings for four scenarios (A, B, C and D) for comparison goods expenditure and two scenarios for convenience goods expenditure (Scenarios B and C only):
- i) Scenario A - this scenario highlights the implications of a fall in the OCA's overall retention rate for the comparison sector in each of the reporting periods.
 - ii) Scenario B - this assumes constant market shares, so that the retention rate established for the 2006 base position (from the survey of households) stays the same in 2011, 2016 and 2021. Thus, in the comparison sector the retention rate remains constant at 28 per cent, and the convenience sector retention rate is fixed at 62 per cent.
 - iii) Scenario C - this scenario envisages a 'moderate' uplift to the retention rate in each of the periods 2006-11, 2011-16 and 2016-21. The uplift in retention will require new development in appropriate town, district and local centres within the OCA of a quality which will boost the overall attractiveness of the OCA's retail offer vis-à-vis the competing retail locations elsewhere in the sub-region.
 - iv) Scenario D - this scenario envisages a more ambitious uplift to the retention rate during each of the reporting periods and would require significant improvements to the retail offer in each of the OCA's town centres.

⁵⁶ PPS6 states (paragraph 3.10) that assessments of retail 'need' should be made using goods based data, and that *'business based cases will not be appropriate.'*

Quantitative Assessment of Need for Further Comparison Sector Floorspace

- 7.9 We have not sought to establish the individual capacities for each of the various centres within the OCA area, because the assessment of the capacity of individual centres based on constant market shares means little. Rather, we have taken a macro approach which assesses the overall amount of residual expenditure likely to be generated by residents of the whole of the OCA area, prior to making recommendations as to where, geographically, any residual should be met, taking into account the hierarchy of existing centres and the sequential approach.
- 7.10 As we explain below, for comparison expenditure the forecast based on a retention uplift may give a more realistic guide to future potential than that based on constant market shares; we consider that 31 per cent represents a reasonable level for illustrating the effects of a 'moderate increased uplift' scenario. Nevertheless, retention levels rise or fall slowly over time, in response to the changing positions of centres in the regional retail hierarchy, and forecasting increases significantly above 30 per cent or so may be unrealistically ambitious given the strong competing centres that lie in relatively close proximity to the OCA's boundary, such as Peterborough, Cambridge and King's Lynn.
- 7.11 We are concerned that the absence of any material level of high quality comparison retail development within the Fenland OCA in recent years is likely to have contributed to a steady decline in retention over time, and that the 28 per cent now achieved represents a decline from previous years. In order to achieve the Scenario C uplift it will be necessary to secure new comparison retail development within the catchment that is of a quality which will boost the overall attractiveness of Fenland's offer vis-à-vis the competing retail locations elsewhere in the sub-region.
- 7.12 Nevertheless, given the presence of higher-order centres relatively close to the catchment area boundary, a significant element of comparison expenditure outflow will be inevitable and is a normal part of the functioning of the retail hierarchy. The so called 'polarisation' trend means that many of the UK's top quality retailers are now unwilling to consider locating in any centre which ranks below 50 in the national rankings. There are no such centres within Fenland's OCA, although significant centres such as Peterborough and Cambridge are located close to the catchment boundary.
- 7.13 With this background in mind, we turn to our assessment of quantitative need in the comparison sector.

Forecast Growth in Comparison Expenditure of OCA Residents

- 7.14 Spreadsheets **CM1**, **CM2**, **CM3** and **CM4** of Annex 2 provide the projections for population, per capita spending and the overall comparison goods spend for residents of each of the six zones. Table 7.1 below summarises the projected growth in comparison spending for residents in the whole of the Fenland OCA, derived by applying the MapInfo/OEF forecast comparison expenditure growth rate of 4.3 per cent, per capita, per annum, as detailed in paragraph 7.1. Under the goods-based approach the growth up to 2021 is £431.8m. The same spreadsheets also summarise the amount of expenditure growth attributable to residents of each zone. The highest absolute growth up to 2021 is for residents of zone 8 (in the north-western part of the OCA), with growth of £70.0m, followed by residents of zone 7 (north east of the OCA), with growth of £65.4m (Spreadsheets **CM1** and **CM4** of Annex 2).

Table 7.1 Projected Growth in the Comparison Expenditure of Residents of the Fenland Overall Catchment Area, £m (2003 Prices)

| | 2006 | 2011 | 2016 | 2021 | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-16 |
|---|-------|-------|-------|-------|-------------------|-------------------|-------------------|-------------------|
| | £m | £m | £m | £m | £m | £m | £m | £m |
| Total Comparison Expenditure (Goods Based) | 433.9 | 528.8 | 672.7 | 865.7 | 95.0 | 143.9 | 193.0 | 431.8 |

- 7.15 Spreadsheets **CM1**, **CM2**, **CM3** and **CM4** of Annex 2 distribute the available comparison expenditure using the results of the household survey for the 2006 base year and assuming constant market shares for each centre/store up to 2011, 2016 and 2021. The spreadsheets set out the resultant turnover that each centre/store would draw from the Fenland OCA in 2011, 2016 and 2021 under the constant market share scenario. Thus, for example, the goods-based comparison turnover of stores in zone 1, drawn from the OCA, would rise from £29.7m in 2006 to £62.6m in 2021, an increase of 107 per cent.
- 7.16 Table 7.2 below sets out the amount of comparison expenditure which is retained by all centres and stores located within the catchment area under the constant market share Scenario B and the growth in retained expenditure that results. Thus, the overall growth in retained expenditure up to 2021 would amount to £14.2m for the whole of the catchment area.

Table 7.2 Comparison Expenditure Retained by Centres/Stores Located in the Fenland Overall Catchment Area, Under Constant Retention Scenario B

| | 2006 | 2011 | 2016 | 2021 | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-16 |
|--|-------|-------|-------|-------|-------------------|-------------------|-------------------|-------------------|
| | £m | £m | £m | £m | £m | £m | £m | £m |
| Total Retained Comparison Expenditure (Goods Based) | 122.9 | 149.9 | 190.6 | 245.3 | 26.9 | 40.8 | 54.7 | 122.4 |

Variation of the Retention Rate

- 7.17 Table 7.3 summarises the outcome of the application of sensitivity testing to the retention rates for all centres and stores within the catchment area. Scenario A represents a fall in the retention rate of three percentage points to 25 per cent by 2021; Scenario B is the constant retention rate; Scenario C illustrates the effects of a moderate increase of three percentage points to 31 per cent by 2021; and, Scenario D a more significant increase of six percentage points, with the retention rate rising to 34 per cent by 2021. The table shows that, for all centres and stores within the catchment, the growth in retained expenditure up to 2021 varies from £93.5m under Scenario A to £171.4m under Scenario D.

Table 7.3 Comparison Expenditure Retained by Centres/Stores Located in the Fenland OCA, Under Each Scenario

| | 2006 | 2011 | 2016 | 2021 | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-21 |
|--|-------|-------|-------|-------|-------------------|-------------------|-------------------|-------------------|
| | £m | £m | £m | £m | £m | £m | £m | £m |
| Total Retained Expenditure - Scenario A | 122.9 | 142.8 | 174.9 | 216.4 | 19.8 | 32.1 | 41.5 | 93.5 |
| Total Retained Expenditure - Scenario B | 122.9 | 149.9 | 190.6 | 245.3 | 26.9 | 40.8 | 54.7 | 122.4 |
| Total Retained Expenditure - Scenario C | 122.9 | 153.4 | 201.8 | 268.4 | 30.4 | 48.5 | 66.6 | 145.4 |
| Total Retained Expenditure - Scenario D | 122.9 | 158.6 | 215.3 | 294.3 | 35.7 | 56.6 | 79.1 | 171.4 |

Allowances for Claims on Comparison Expenditure Growth

- 7.18 Table 7.4 summarises the main deductions for the claims on the initial surplus of comparison expenditure - i.e. the allowances for existing retail planning commitments for increased floorspace efficiency, and for an increase in sales assumed to be directed to non-store based retailers - under each of the four retention rate scenarios. In relation to commitments, there are five significant (over 300 sq.m (3,300 sq.ft) gross floorspace) comparison retail commitments to take account of in the OCA. These developments together comprise some 2,562 sq.m (27,577 sq.ft) of new comparison floorspace (net sales area). We estimate that the developments will account for some £10.1m of the initial surplus of comparison expenditure at 2011 (row 23 of Spreadsheets **CM5, CM6, CM7** and **CM8** of Annex 2).
- 7.19 The table shows that the overall range in the comparison goods residual under the four different scenarios at 2021 is from £38.7m to £116.6m. However, it should be noted that under Scenario A there is a negative residual of £3.0m at 2011.
- 7.20 This overall range is very wide. Moreover, we do not consider that it is sensible to plan for a downturn in the retention rate, or that significantly increasing the retention rate of 28 per cent in 2006 to 34 per cent in 2021 is likely to be achieved. These scenarios are included for illustration purposes. Thus, using the constant retention scenario and the moderate retention growth scenarios, our 'mid-point' range indicates a residual of between £67.6m and £90.6m at 2021.
- 7.21 It is clear that, under 'mid-point' range, there is a substantial expenditure residual available to support new comparison retail floorspace within the study area, particularly with a moderate increase to the retention rate.

Table 7.4 Initial Comparison Retail Expenditure Residual

| Scenario A - Decreased Retention | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-21 |
|---|---------------------------|---------------------------|---------------------------|---------------------------|
| Goods Base | £m | £m | £m | £m |
| Initial Surplus | 19.8 | 32.1 | 41.5 | 93.5 |
| Claims on Capacity | 22.9 | 15.2 | 16.8 | 54.8 |
| Residual | -3.0 | 16.9 | 24.8 | 38.7 |
| Scenario B - Constant Retention | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-21 |
| Goods Base | £m | £m | £m | £m |
| Initial Surplus | 26.9 | 40.8 | 54.7 | 122.4 |
| Claims on Capacity | 22.9 | 15.2 | 16.8 | 54.8 |
| Residual | 4.0 | 25.6 | 37.9 | 67.6 |
| Scenario C - Moderate Increased Retention | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-21 |
| Goods Base | £m | £m | £m | £m |
| Initial Surplus | 30.4 | 48.5 | 66.6 | 145.4 |
| Claims on Capacity | 22.9 | 15.2 | 16.8 | 54.8 |
| Residual | 7.5 | 33.3 | 49.8 | 90.6 |
| Scenario D - Significant Increased Retention | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-21 |
| Goods Base | £m | £m | £m | £m |
| Initial Surplus | 35.7 | 56.6 | 79.1 | 80.2 |
| Claims on Capacity | 22.9 | 15.2 | 16.8 | 54.8 |
| Residual | 12.8 | 41.4 | 62.3 | 116.6 |

Converting Residual Comparison Expenditure to Net Sales Floorspace Requirements⁵⁷

- 7.22 In order to translate residual expenditure into floorspace, we use a floorspace efficiency rate at 2011 of £4,168 per sq.m net. This is derived by combining an assumed floorspace efficiency rate that is typical of 'high street' comparison-type retail developments of £4,300 per sq.m net in the year 2006, and a lower efficiency rate of £2,300 per sq.m net which is closer to what could be expected to be achieved by a range of 'bulky goods' or retail warehouse-type stores, in the ratio of 68 per cent ('high street') to 32 per cent ('bulky goods'). This accords with the breakdown of retail spending estimates in Table 1.1 of Experian's Retail Planner Briefing Note 3.0. We also incorporate a 2.0 per cent, per annum forecast growth rate to give a floorspace efficiency rate of £4,601 per sq.m net in 2016 and of £5,080 per sq.m net in 2021.
- 7.23 Table 7.5 draws together the findings and converts the residual expenditure totals from the two retention scenarios forming the mid-point range (Scenario B and Scenario C) into theoretical net sales⁵⁸ floorspace requirements.
- 7.24 As Table 7.5 shows, for the OCA as a whole, the quantitative need up to 2021 ranges from around 14,000 sq.m (150,700 sq.ft) net under constant retention Scenario B, to around 18,800 sq.m (202,800 sq.ft) net under moderate increased retention Scenario C. It is evident, therefore, that there is capacity for substantial quanta of new comparison retail floorspace within Fenland OCA in the 2006-21 study period.

Table 7.5 Conversion of Expenditure Surplus to Comparison Floorspace Requirements

| Scenario B - Constant Retention | | | | |
|--|----------------|----------------|----------------|----------------|
| COMPARISON | 2006-11 | 2011-16 | 2016-21 | 2006-21 |
| Goods Base Residual (£m) | 4.0 | 25.6 | 37.9 | 67.6 |
| Assumed Floorspace Efficiency, £ per sq.m sales area | 4,168 | 4,601 | 5,080 | |
| Floorspace Requirement, sq.m sales area | 971 | 5,563 | 7,466 | 14,001 |
| Scenario C - Moderate Increased Retention | | | | |
| COMPARISON | 2006-11 | 2011-16 | 2016-21 | 2006-21 |
| Goods Base Residual (£m) | 7.5 | 33.3 | 49.8 | 90.6 |
| Assumed Floorspace Efficiency, £ per sq.m sales area | 4,168 | 4,601 | 5,080 | |
| Floorspace Requirement, sq.m sales area | 1,810 | 7,232 | 9,801 | 18,843 |

- 7.25 The comparison expenditure capacity forecasts should be interpreted with some care. First, it should be noted that the scale of the requirement set out at the higher end of the forecast range arises as a result of a steady increase in the aggregate catchment area retention rate over the study period, and - as noted previously - this increase is dependant on new retailer and investor interest in the catchment being translated into new comparison retail floorspace, which in overall terms will allow retailing within the catchment to compete more effectively with centres outside its boundaries than it does at present. Such development, when implemented, would increase the 'base' retention rate above 28 per cent.
- 7.26 Second, more than half of the expenditure residual available to support new floorspace identified under each of the above scenarios does not arise until the 2016-2011 period. Notwithstanding this, the Scenario C floorspace requirement arising by 2016 of around 7,200 sq.m (77,800 sq.ft) net sales area is still significant in the Fenland context.

⁵⁷ As with the convenience sector forecasts, our comparison sector floorspace forecasts should be treated as indicative only. Long-term forecasts to 2016, whilst valuable for strategic planning purposes, should be regarded as subject to increasing uncertainty in the later parts of the study period and should be kept under regular review.

⁵⁸ Typical net to gross ratios are 70 per cent for 'high street' comparison retail and 80 to 90 per cent for comparison retail warehouses.

- 7.27 Third, the positive capacity residual in the comparison sector does not necessarily imply that there is scope for further out-of-centre development; it will be necessary to evaluate any individual proposals as they come forward in the light of the specific format of retailing proposed, and the scale of identified requirements. Indeed, any proposals which come forward in out-of-centre locations will need to be subject to the stringent application of the five key national policy tests and there must be no risk of any harm to the vitality and viability of the catchment's town centres.
- 7.28 Nevertheless, it is evident that under a policy aspiration scenario of seeking to increase the retention rate from its current level of 28 per cent - which we consider is capable of improvement, even given the relatively close proximity of the higher-order retail centres of Peterborough, Cambridge and King's Lynn close to but outside of the catchment area boundary - there is scope for a significant amount of additional comparison retail development within the Fenland OCA during the period up to 2021. Such development presents the opportunity to address local deficiencies in relation to specific categories of expenditure and will also contribute to raising the overall or aggregate retention rate for the catchment area, thus enhancing overall retail provision in the Fenland area and improving its ability to meet the shopping needs of local residents.

Summary of Quantitative Need in the Comparison Sector

- 7.29 There is a clear quantitative need for additional comparison retail floorspace in the Fenland OCA, from around 14,000 sq.m (150,700 sq.ft) net when assessed on the basis of constant market shares (Scenario B), to around 18,800 sq.m (202,800 sq.ft) net based on a forecast increase to the retention rate (Scenario C). We believe that it is both a realistic and desirable planning policy objective to seek an increase in the existing comparison retention rate - which even for a location surrounded by higher-order centres is modest, at 28 per cent - and so we consider that the Scenario C forecast should form the policy aspiration target.

Quantitative Assessment of Need for Further Convenience Sector Floorspace

- 7.30 As with the comparison sector, we have not sought to establish the individual capacities for each of the various centres within the OCA area, and have instead taken a macro approach which assesses the overall amount of residual expenditure likely to be generated by residents of the whole of the OCA area. We then make recommendations as to where, geographically, any residual should be met, taking into account the hierarchy of existing centres and the sequential approach.
- 7.31 Whilst the OCA as a whole retains 62 per cent of available convenience expenditure - which is a reasonably healthy overall level of expenditure retention for a predominantly rural catchment, with large centres such as Peterborough in close proximity - some zones (in particular, zone 6) retain a relatively low proportion of expenditure. Thus, we consider that there is scope to increase the overall convenience sector retention rate. We do acknowledge, however, that some parts of the OCA are relatively close to substantial foodstores close to but outside the OCA boundary, such as the Tesco at Ely and the Tesco Extra at Peterborough, which means that some degree of expenditure leakage will be inevitable.
- 7.32 Given the localised nature of convenience shopping, it would be undesirable from a policy perspective if there were to be any reduction in the convenience goods retention level. Therefore, our assessment proceeds on the basis of two 'scenarios', which assume that, as a minimum policy objective, the OCA's retention rate as a whole should be maintained at least in line with the estimated base of 62 per cent; and a second scenario which assumes that the OCA's retention rate could rise to 65 per cent

by 2011, to 68 per cent by 2016, and again to 70 per cent by 2021, giving a total increase of 8 percentage points over the whole study period.⁵⁹

Forecast Growth in Convenience Expenditure of OCA Residents

- 7.33 The forecast growth in convenience goods expenditure of the residents of the OCA area arises from population growth of 14.3 per cent in the period from 2006 to 2021 (as described at the beginning of this section), and an increase over time in per capita spending levels. MapInfo supplied base per capita spending levels for the year 2003 for each of the eight expenditure areas shown in Figure 6.1. We rolled these data forward to 2006 - and to the later forecast years of 2011, 2016 and 2021 - by applying the MapInfo/OEF annual forecast growth rate for convenience goods of 0.9 per cent, per capita, per annum, as set out in Table 2 of MapInfo's Information Brief 05/02.
- 7.34 Spreadsheets **CV1**, **CV2**, **CV3** and **CV4** of Annex 2 provide the resultant projections for population, per capita spending and the overall convenience goods spend for residents of each of the eight OCA zones. Table 7.6, below, summarises the projected growth in convenience spending for residents in the whole of the OCA area. Under the goods-based approach, the growth up to 2021 is £61.3m. The same spreadsheets also summarise the geographical source of the expenditure growth. The amount of growth in each zone is simply a reflection of the population increase in each zone and the variation in convenience spending levels across the OCA; the highest absolute growth up to 2021 is for residents of zone 2 (the March area) and zone 8 (north-western part area of the OCA), which both have growth of £10.6m, followed by residents of zone 1 (the Wisbech area), with growth of £9.7m (Spreadsheets **CV1** and **CV4** of Annex 2).

Table 7.6 Projected Growth in the Convenience Expenditure of Residents of the Fenland Overall Catchment Area, £m (2003 Prices)

| | 2006 | 2011 | 2016 | 2021 | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-21 |
|--|-------|-------|-------|-------|-------------------|-------------------|-------------------|-------------------|
| | £m | £m | £m | £m | £m | £m | £m | £m |
| Total Convenience Expenditure (Goods Based) | 233.2 | 248.9 | 269.9 | 294.5 | 15.7 | 21.1 | 24.6 | 61.3 |

- 7.35 Spreadsheets **CV1**, **CV2**, **CV3** and **CV4** of Annex 2 distribute the available expenditure using the results of the household survey for the 2006 base year and assuming constant market shares for each centre/store up to 2011, 2016 and 2021. The spreadsheets also show the resultant turnover that each centre/store would draw from the OCA under the constant market share scenario. Thus, for example, the goods-based convenience turnover of food stores in zone 1, drawn from the OCA, would rise from £27.7m in 2006 to £36.9m in 2021, an increase of 33 per cent.
- 7.36 Table 7.7, below, sets out the amount of convenience expenditure that is retained by centres/stores located within the catchment area, under the constant market share scenario, and the growth in retained expenditure which results. Thus, the overall growth in retained expenditure up to 2021 would amount to £38.1m under a 'goods-based' approach.

⁵⁹ For consistency with the comparison sector, we refer to the constant retention forecast as 'Scenario B', and the rising retention forecast as 'Scenario C'. However, we do not provide 'Scenario A' or 'Scenario D' forecasts in relation to the convenience sector.

Table 7.7 Convenience Expenditure Retained by Centres/Stores Located in the Fenland Overall Catchment Area, Under Constant Retention Scenario

| | 2006 | 2011 | 2016 | 2021 | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-21 |
|---|-------|-------|-------|-------|-------------------|-------------------|-------------------|-------------------|
| | £m | £m | £m | £m | £m | £m | £m | £m |
| Total Retained Convenience Expenditure (Goods Based) | 144.9 | 154.7 | 167.8 | 183.1 | 9.7 | 13.1 | 15.3 | 38.1 |

Allowances for Claims on Convenience Expenditure Growth

- 7.37 Before the increases in retained convenience expenditure can be converted into theoretical floorspace requirements, it is necessary to take account of an allowance for food retail planning commitments. In the case of the Fenland catchment, we understand that there is only one significant foodstore commitment, namely the proposal for a foodstore at land adjacent to Ramsey Industrial Park, Stocking Fen Road, Ramsey, just outside Fenland District, but within the OCA. This proposed development comprises 1,226 sq.m of new convenience floorspace (net sales area), and we estimate that it will account for £14.6m of the initial surplus of convenience expenditure at 2011.
- 7.38 A further deduction is necessary in order to allow for the likely growth in productivity amongst existing retailers within the OCA of 0.2 per cent, per annum, as detailed in paragraph 7.1. This growth represents a 'claim' on the forecast increase in retained expenditure, and thus not all of the increase will be available to support new floorspace.

Residual Expenditure - Convenience Sector

- 7.39 Table 7.8 summarises the main deductions for the claims on the initial surplus of convenience expenditure, under each of the expenditure retention scenarios. The table shows that there is an overall positive residual at 2021 under both retention scenarios.
- 7.40 Under the constant retention (Scenario B) assumption, significant positive residuals arise in the 2011-16 and 2016-2021 periods (of £11.5m and £13.7m respectively). These positive residuals far outweigh the negative residual that arises in the initial 2006-11 period, so that by 2021 there is an overall residual of £18.8m. The moderate increased retention scenario (Scenario C) generates greater positive residuals, of £0.7m in the period to 2011, £20.2m from 2011-16 and a further £21.0m from 2016-21, resulting in an overall residual of £41.9m in the 2006-21 study period.

Table 7.8 Initial Convenience Retail Expenditure Residual

| Scenario B - Constant Retention | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-21 |
|--|---------------------------|---------------------------|---------------------------|---------------------------|
| Goods Base | £m | £m | £m | £m |
| Initial Surplus | 9.7 | 13.1 | 15.3 | 38.1 |
| Claims on Capacity | 16.1 | 1.6 | 1.6 | 19.3 |
| Residual | -6.4 | 11.5 | 13.7 | 18.8 |
| Scenario D - Moderate Increased Retention | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-21 |
| Goods Base | £m | £m | £m | £m |
| Initial Surplus | 16.8 | 21.8 | 22.6 | 61.2 |
| Claims on Capacity | 16.1 | 1.6 | 1.6 | 19.3 |
| Residual | 0.7 | 20.2 | 21.0 | 41.9 |

Converting Residual Expenditure to Net Convenience Retail Floorspace Requirements⁶⁰

- 7.41 In order to translate residual expenditure into floorspace requirements, we have used two assumed base sales densities, of £11,000 per sq.m net in the 2006 base year - which is typical of levels that could be expected to be achieved by modern superstore operators - and of £6,000 per sq.m net, which is more typical of turnover efficiencies achieved by smaller supermarkets and discount operators. The lower levels of expenditure growth in the convenience sector (in relation to the comparison sector) indicate a reduced need to take account of increases in floorspace efficiency. However, it is still necessary to make some allowance for increased turnover of new floorspace in the future and we do so by increasing the 'base' floorspace efficiency to some £11,335 per sq.m by the end of the study period ('superstore' option), and to £6,183 per sq.m ('smaller supermarket/discount' option).
- 7.42 Table 7.9 draws together the findings and converts the outputs from each of the convenience expenditure scenarios - the residual expenditure totals - into theoretical net sales⁶¹ floorspace requirements. Although there is a negative floorspace requirement in the 2006-11 period under Scenario B (constant retention), positive floorspace requirements arise in the 2011-16 and 2016-21 period, which more than offset the initial negative residual.
- 7.43 The positive convenience goods residual of £18.8m under Scenario B (constant retention) would support a convenience goods sales area in the period up to 2021 of around 1,650 sq.m (17,800 sq.ft), at typical company averages for large supermarket operators. When a lower floorspace efficiency rate is assumed, typical of that achieved by smaller or discount foodstore operators, the potential scale of floorspace rises to around 3,000 sq.m (32,700 sq.ft) net sales area by the end of the study period.
- 7.44 The higher positive convenience goods residual of £41.9m under Scenario C (rising retention) would support a convenience goods sales area in the period up to 2021 of around 3,700 sq.m (40,000 sq.ft), at typical company averages for large supermarket operators. When a lower floorspace efficiency rate is assumed, the potential scale of floorspace rises to around 6,800 sq.m (73,300 sq.ft) net sales area by the end of the study period.

Table 7.9 Conversion of Expenditure Surplus to Convenience Floorspace Requirements

| SCENARIO B - CONSTANT RETENTION | | | | |
|---|----------------|----------------|----------------|----------------|
| CONVENIENCE | 2006-11 | 2011-16 | 2016-21 | 2006-21 |
| Goods base residual (£m) | -6.4 | 11.5 | 13.7 | 18.8 |
| Assumed Floorspace Efficiency, £ per sq.m sales area ('High') | 11,110 | 11,222 | 11,335 | |
| Floorspace requirement, sq.m sales area ('High') | -572 | 1,023 | 1,204 | 1,655 |
| Assumed Floorspace Efficiency, £ per sq.m sales area ('Low') | 6,060 | 6,121 | 6,183 | |
| Floorspace requirement, sq.m sales area ('Low') | -1,049 | 1,875 | 2,208 | 3,034 |
| SCENARIO C - MODERATE INCREASED RETENTION | | | | |
| COMPARISON | 2006-11 | 2011-16 | 2016-21 | 2006-21 |
| Goods base residual (£m) | 0.7 | 20.2 | 21.0 | 41.9 |
| Assumed Floorspace Efficiency, £ per sq.m sales area ('High') | 11,110 | 11,222 | 11,335 | |
| Floorspace requirement, sq.m sales area ('High') | 66 | 1,798 | 1,851 | 3,715 |
| Assumed Floorspace Efficiency, £ per sq.m sales area ('Low') | 6,060 | 6,121 | 6,183 | |
| Floorspace requirement, sq.m sales area ('Low') | 122 | 3,296 | 3,394 | 6,812 |

⁶⁰ Our floorspace capacity projections should be treated as indicative only. Long-term forecasts to 2016 and 2021, whilst valuable for strategic planning purposes, should be regarded as subject to increasing uncertainty in the later parts of the study period and should be kept under regular review.

⁶¹ The typical gross to net ratio for convenience retail stores is 60 per cent.

Summary of Quantitative Need in the Convenience Sector

- 7.45 As a result of forecast expenditure and population growth, there is a significant quantitative requirement for further convenience goods floorspace in the period up to 2021. Under the rising retention Scenario C - which we consider should form the policy aspiration target - there is scope for around 3,700 sq.m (40,000 sq.ft) of additional convenience floorspace (net sales area) in the period to 2021 if developed in superstore format, which equates to around 6,200 sq.m (66,700 sq.ft) gross. If developed in smaller supermarket format, the floorspace capacity rises to around 6,800 sq.m (73,300 sq.ft) net, or around 11,400 sq.m (122,200 sq.ft) gross.
- 7.46 These floorspace requirements relate to the growth in retained expenditure for the whole of the catchment area and development to meet most, or all of it, should be channelled to the existing town, district and local centres within the catchment if at all possible. Development that could help to improve the localised retention rate in zones 3, 5, 6 and 8 should be viewed favourably, subject to the sequential approach and having ensured that the proposed quantum of floorspace is of an appropriate scale.
- 7.47 In the course of research undertaken for this study we have identified four prominent foodstore operators with a potential interest for new foodstore development within the catchment area, one of which is interested solely in Wisbech with the other operators citing Wisbech, Whittlesey and Chatteris as potential investment locations. In addition, Tesco has submitted an application for a second extension of its store at Cromwell Road in Wisbech.
- 7.48 If some of this operator demand is realised and additional convenience floorspace materialises (within the floorspace capacity limits that we have identified) then this would help to increase the catchment area's overall convenience sector retention rate above the current level, which at 62 per cent is modest. We provide further advice in relation to potential locations for accommodating new convenience retail floorspace as part of our concluding section to the report.

8 ASSESSMENT OF SCOPE FOR ADDITIONAL COMMERCIAL LEISURE PROVISION

Forecast Increases in Leisure Expenditure

- 8.1 The approach to the assessment of quantitative need in the leisure sector is less well developed than in the retail sector. Furthermore, development in the leisure sector has historically been very market-led, and it is only recently that leisure has been brought into the range of uses covered by the sequential approach.
- 8.2 Nevertheless, Experian has recently published information on leisure spending in six COICOPS (Classification of Individual Consumption by Purpose) categories⁶². The Experian information reveals the following pattern of leisure spend across the UK:

Table 8.1 Breakdown of Leisure Spend in the UK in 2004

| COICOPS Categories | Description | UK Spend Per capita £ | % of Total Leisure Spend |
|--------------------|--------------------------------------|-----------------------|--------------------------|
| 11.1.1 | Restaurants, cafés, bars, etc | 1,000 | 60.9 |
| 9.4.2 | Cultural services | 238 | 14.5 |
| 9.4.3 | Games of chance | 151 | 9.2 |
| 11.2 | Accommodation services | 92 | 5.6 |
| 9.4.1 | Recreational and sporting services | 83 | 5.0 |
| 12.1.1 | Personal services (hairdressers etc) | 78 | 4.8 |
| TOTAL | | 1,634 | 100.0 |

- 8.3 Table 8.1 reveals that restaurants, cafés and bars account for around three fifths of the UK spend on leisure services. 'Cultural services' and 'games of chance' are the second and third highest categories, but these account for just 14 per cent of leisure spend and 9 per cent of leisure spend, respectively. Furthermore, commercially oriented property developments, such as cinemas, account for only a small fraction of spend on 'cultural services' (5.1 per cent), with bingo halls accounting for just 6 per cent of spend on 'games of chance', and with casinos accounting for just 14 per cent of spend on 'games of chance'⁶³.
- 8.4 Bearing in mind the structure of current spend on leisure services, our next step in the assessment of leisure need was to calculate the growth in leisure spend for residents of Fenland's overall catchment area (OCA) in the period up to 2021. We obtained per capita leisure expenditure data from Experian for residents across the OCA, for the same eight zones that we used for the retail forecasts (as depicted in Figure 6.1). This is set out in Spreadsheet CL1, which also shows how the leisure spend is projected forward to the year 2021, using Experian's recommended growth rate for spending on leisure services of 1.4 per cent, per capita, per annum for the period 2005 to 2014⁶⁴. Spreadsheet CL1 reveals that the total leisure spend for the Fenland OCA area is projected to grow from £238.68m in 2006 to £335.59m in the year 2021. Thus, the growth in spending on leisure services, at 40.6 per cent in the period up to 2021, far exceeds the total projected population growth in this period of around 14 per cent.

⁶² Experian, *Retail Planner Briefing Note 3.0* (March 2006), Table 2.1.

⁶³ Betting accounts for the greatest proportion of 'games of chance' expenditure (36 per cent, according to the Leisure Industries Research Council, LIRC).

⁶⁴ Experian, *Retail Planner Briefing Note 3.0* (March 2006), Table 3.2. Experian's forecasts do not go beyond 2014; in the absence of any better information we have therefore also applied the 1.4 per cent, per annum forecast growth rate to the post-2014 period.

- 8.5 In absolute terms, the growth in leisure spend within the OCA in the period to 2021 amounts to £96.6m. Applying Experian's current market shares (from Table 8.1 above), some 61 per cent of this (£59m) will be for restaurants, cafés and bars. In contrast, the growth that would be absorbed by cinemas at current market shares of leisure spending would be less than 1 per cent (£716,700), with bingo halls (£649,800) and casinos (£824,300) each also absorbing less than 1 per cent of the growth.

Conversion of Expenditure Increases to Additional Leisure 'Requirements'

Cinemas

- 8.6 Parts of the Fenland OCA are within reasonable driving distance of multiplex cinemas located outside of the OCA. For instance, there is a 13-screen Showcase facility at Peterborough (13 miles from March and 4 miles from Whittlesey); a 3-screen Majestic facility at King's Lynn (12 miles from Wisbech); a 10-screen Cineworld complex at Huntingdon (12 miles from Chatteris, and 14 miles from Whittlesey).
- 8.7 Nevertheless, the Fenland OCA contains only one cinema screen, namely the Hippodrome facility in March (Dartford Road). Given that the OCA has a resident population of 156,079 persons - and based on a population density of 18,750 persons per screen, which is the average for the 'East of England' region⁶⁵ - this level of cinema provision would appear to be inadequate, even allowing for the multiplex facilities that are reasonably close to the OCA.
- 8.8 Data from Dodona suggest that the average multiplex screen accounts for an annual spend of £301,000 in ticket revenue, whereas an independent screen accounts for £148,000 per annum in ticket revenue. The £716,700 increase in cinema expenditure arising in the Fenland OCA by 2021 as a consequence of population growth and increases in per capita leisure expenditure is therefore sufficient to support two or three multiplex cinema screens within the OCA, or about five additional independent screens.

Bingo

- 8.9 The Fenland OCA currently contains two small bingo facilities, namely the Empire Bingo and Social Club, in Wisbech (Blackfriars Road), and the Hippodrome facility at March. Two larger facilities are available to the west and east of the OCA, namely the Gala clubs at Peterborough (Westfield Road) and King's Lynn (Theatre Royal, St James Street).
- 8.10 The additional £649,800 in bingo hall expenditure is insufficient to support a Gala or Mecca-type club, which generate average annual net stakes of around £1.47m per branch. However, the £649,800 is sufficient to support at least one additional neighbourhood club, for which annual net stakes average around £444,000 per branch.

Casinos

- 8.11 The additional £824,300 in casino expenditure - at constant market shares - is substantially below the level required to support a small-scale 'traditional' casino, which generate average annual turnovers of around £3.6m per casino⁶⁶.

Food and Drink

- 8.12 It should be noted that whilst most of the growth in food and drink expenditure will be available for new facilities within the Fenland OCA, some of the growth is likely to be accounted for by facilities located outside of the catchment. For instance, when telephone survey respondents were asked where they spent most money in pubs, the

⁶⁵ Source: The Cinema Advertising Association

⁶⁶ Source - The Gambling Commission

principal town centres within the OCA - Wisbech, March, Ramsey, Whittlesey and Chatteris - collectively accounted for around 20 per cent of all responses, with other locations within the OCA accounting for a further 9 per cent of total responses. As we reported in Section 6, a significant proportion of the survey respondents (57 per cent) stated that they do not visit pubs. Pubs in named locations outside of the Fenland OCA currently account for around 10 per cent of main visits to pubs. The remaining 4 per cent of respondents stated 'don't know' or 'it varies'.

- 8.13 Similarly, when asked where most money is spent in restaurants, facilities within the catchment area collectively accounted for 27 per cent of the responses. Some 27 per cent of respondents stated that they do not visit restaurants. Facilities in named centres located outside of the catchment currently account for around 31 per cent of households' main expenditure in restaurants. The remaining 15 per cent of respondents stated 'don't know' or 'it varies'.
- 8.14 Nevertheless, these findings demonstrate that, at present, only a minority of expenditure on pubs and restaurants - i.e. 10 per cent in relation to pubs, and just under a third of restaurant expenditure - is spent outside of the Fenland OCA. If these current market shares persist, then around four fifths of the £59m growth in food and drink expenditure arising by 2021 will be available for new facilities located within the Fenland OCA, which equates to around £47m. This would be sufficient to support a range of new, good-quality restaurants (which generate annual turnovers of around £850,000 to £1m, with some high-profile names taking in excess of £1m per annum) - as well as several branded pubs/bars, which have a typical annual turnover of between £870,000 and £1m - in addition to productivity increase for existing pub operators/restaurateurs.

Summary of Scope for Additional Commercial Leisure Facilities

- 8.15 Overall, spending on leisure in the Fenland catchment area is forecast (using local data and national growth projections) to grow by 41 per cent (a gain of £96.6m) in the period up to 2021. How this growth might be expended locally depends very much on what opportunities the market supplies - thus, current spending patterns can only provide a guide to what might happen in the future.
- 8.16 On current spending patterns in the catchment, almost two-thirds of this spending growth (some £59m) will go to eating and drinking outside the home (restaurants, cafés and bars). Capturing a sizeable proportion of this growth in expenditure through the provision of a better and more appealing choice of restaurants, cafés and bars/pubs will be vital to the future health of the various centres within the catchment, some of which fulfil a dual retail-tourism role.
- 8.17 The rest of the expenditure growth will go to a wide mix of activities (for instance, bingo halls and cinemas), with no single activity capturing any significant market growth. Even so, there does appear to be scope for some additional entertainment-type leisure, including at least one neighbourhood bingo club and several cinema screens.
- 8.18 As we have stressed, the approach to the assessment of quantitative need in the leisure sector is less well developed than in the retail sector and so the quantitative 'needs' that we have identified should be treated as an indicative guide. Furthermore, the sector is dynamic, changing and operator-led. If an investor feels capable of attracting customers by diverting spending from other facilities, the planning system does not prevent additional development provided it meets other criteria for vital and viable town centres.

9 OVERALL CONCLUSIONS AND KEY RECOMMENDATIONS

Introduction

- 9.1 The purpose of this study is to provide a robust evidence base on the capacity for additional retail and leisure development in the period to 2021, which Fenland District Council can use to inform the preparation of its Local Development Framework (LDF). In order to assist the Council with this, we pull together, below, the principal findings from the various lines of research that informed the study, and the retail and leisure capacity exercises, in order to identify key quantitative and qualitative needs. We also provide our advice on accommodating identified retail and leisure needs.

Summary of Performance Analysis and Key Qualitative Needs

Wisbech

- 9.2 Wisbech town centre performs well in relation to some of the nine key indicators of vitality and viability that we assessed, and moderately well or poorly in relation to others.
- 9.3 In terms of numbers of units in the convenience sector, Wisbech town centre is under-represented when compared to the national average, although the town as a whole is adequately served by the out-of-centre Asda and Tesco stores, and the town centre does have representation in most convenience sub-sectors. Of more concern is the under-representation in certain key sub-sectors, including fashion, and there also appears to be some room for enhancement of the centre's food and drink offer.
- 9.4 Also of concern is the above-average proportion of vacant units in the town centre, and the presence of a number of long-term vacant units. Furthermore, the available units in the town centre are unsuited to the operational requirements of modern retailers, in terms of size and configuration.
- 9.5 Wisbech has performed moderately well in relation to the retail rents and retail rankings indicators. Whilst four lower-ranking comparator centres currently command higher rents than Wisbech, the 33 per cent rental increase experienced in Wisbech between 2003 and 2005 represents the best performance of the comparator centres, albeit this improvement was from a low absolute base and absolute rents remain low in Wisbech. Similarly, whilst Wisbech has experienced some recent slippage in the retail rankings, some similar-sized centres has also experienced negative movements, although other centres such as Huntingdon and Ely have improved their rankings over the same period.
- 9.6 More positively, there is a reasonably extensive mix of comparison sector outlets in the town centre, although as we have highlighted there is room for improvement in certain key sub-sectors. The current number of published retailer requirements represents the historic peak, and research undertaken during the course of this study has identified a range of other prominent retail operators that also have an interest in being represented in Wisbech. Furthermore, retail yields have recently improved significantly, with the 1.5 percentage point improvement in Wisbech representing the joint-best performance of the 15 centres that we assessed.
- 9.7 The town centre is busy and presents an attractive environment. The architectural quality is generally of a high standard, reflecting the town centre's conservation area status. Overall, we conclude that Wisbech is generally a vital and viable town centre, although there is room for improvement, particularly in relation to filling void units and bolstering representation in the key fashion sector.

March

- 9.8 March town centre performs well in relation to most key performance indicators for which data are available. Whilst the centre contains few national multiple comparison operators, this is not untypical for centres of the size and function of March. The town centre is well served by convenience retailers, and has a broad range of independent retailers as well as service uses and other amenities.
- 9.9 The centre is busy and physically attractive - being a conservation area - and contains very few vacant units. There is a good level of demand for representation in March from a range of prominent retail operators, including national multiple clothes retailers, the introduction of which would significantly enhance the centre's offer. At present, however, there are few available units available in appropriate locations that are of a suitable size to meet this operator demand.
- 9.10 As with Wisbech, retail yields in March have improved significantly in recent years. Of particular note is the substantial recent improvement that March experienced in the retail rankings, the 105-place climb representing the best performance of all comparator centres.
- 9.11 Our overall conclusion is that March is a healthy and vibrant centre. Providing units of the right size and configuration to meet the good levels of operator demand would consolidate this position.

Whittlesey and Chatteris

- 9.12 Whittlesey and Chatteris both function as local service centres as opposed to main retail destinations. Whilst Whittlesey contains more vacant units than would be desirable, most of these are not in the core of the shopping area and some recently vacated units are already being redeveloped. Chatteris has a low overall vacancy rate and the presence of a range of hotels and food and drink outlets indicates that Chatteris functions successfully as a dual tourism/local service centre. Both centres contain a range of service uses and small supermarkets, suggesting that they meet the day-to-day needs of the surrounding rural catchment reasonably well, although we acknowledge that local residents will have to travel elsewhere for their bulk and main food shopping provisions.

Summary of Quantitative Need

Comparison Retail Sector

- 9.13 Our quantitative capacity work shows that there is a goods based capacity for additional comparison sector sales floorspace up to 2021 in the range 14,000 sq.m (150,700 sq.ft) under the Scenario B forecast ('constant retention'), to around 18,800 sq.m (202,800 sq.ft) under Scenario C ('moderate increased retention'). We believe that the floorspace requirement arising under Scenario C is both a realistic and desirable planning policy objective, given that the centres and stores located within the catchment area collectively retain only 28 per cent of available comparison expenditure, which is disappointing even for a location that is surrounded by higher-order centres.

Table 9.1 Goods Based Comparison Sector Floorspace Requirements

| Floorspace Requirement (net sales area) | 2006-11 | 2011-16 | 2016-21 | 2006-21 |
|---|---------|---------|---------|---------------|
| Constant Retention (Scenario B) | 971 | 5,563 | 7,466 | 14,001 |
| Rising Retention (Scenario C) | 1,810 | 7,232 | 9,801 | 18,843 |

- 9.14 The comparison retail floorspace requirements set out in Table 9.1 (as with the convenience sector requirements summarised in Table 9.2) are indicative only, and should be treated as guidelines. Long-term forecasts, whilst valuable for strategic

planning purposes, should be regarded as subject to increasing uncertainty in the later parts of the study period and should be kept under regular review.

Convenience Retail Sector

- 9.15 As a result of forecast expenditure and population growth, there is a significant quantitative requirement for further convenience goods floorspace in the period up to 2021. Under the rising retention Scenario C - which we consider should form the policy aspiration target - there is scope for around 3,700 sq.m (40,000 sq.ft) of additional convenience floorspace (net sales area) in the period to 2021 if developed in superstore format. If developed in smaller supermarket format, the floorspace capacity rises to around 6,800 sq.m (73,300 sq.ft) net.

Table 10.2 Goods Based Convenience Sector Floorspace Requirements

| Floorspace requirement (net sales area) | | 2006-11 | 2011-16 | 2016-21 | 2006-21 |
|---|--------------------------|---------|---------|---------|--------------|
| Constant Retention | 'High' Turnover per sq.m | -572 | 1,023 | 1,204 | 1,655 |
| | 'Low' Turnover per sq.m | -1,049 | 1,875 | 2,208 | 3,034 |
| Increased Retention | 'High' Turnover per sq.m | 66 | 1,798 | 1,851 | 3,715 |
| | 'Low' Turnover per sq.m | 122 | 3,296 | 3,394 | 6,812 |

Commercial Leisure Sector

- 9.16 Spending on leisure in the Fenland catchment area is forecast (using local data and national growth projections) to grow by 41 per cent (a gain of £96.6m) in the period up to 2021. How this growth might be expended locally depends very much on what opportunities the market supplies - thus, current spending patterns can only provide a guide to what might happen in the future.
- 9.17 On current spending patterns in the catchment, almost two-thirds of this spending growth (some £59m) will go to eating and drinking outside the home (restaurants, cafés and bars). Capturing a sizeable proportion of this growth in expenditure through the provision of a better and more appealing choice of restaurants, cafés and bars/pubs will be vital to the future health of the various centres within the catchment, some of which fulfil a dual retail-tourism role.
- 9.18 The rest of the expenditure growth will go to a wide mix of activities (for instance, bingo halls and cinemas), with no single activity capturing any significant market growth. Even so, there does appear to be scope for some additional entertainment-type leisure, including at least one neighbourhood bingo club and several cinema screens.
- 9.19 As we have stressed, the approach to the assessment of quantitative need in the leisure sector is less well developed than in the retail sector and so the quantitative 'needs' that we have identified should be treated as an indicative guide. Furthermore, the sector is dynamic, changing and operator-led. If an investor feels capable of attracting customers by diverting spending from other facilities, the planning system does not prevent additional development provided it meets other criteria for vital and viable town centres.

Opportunities for Meeting Identified Retail and Leisure Needs

Introduction

- 9.20 Paragraph 2.44 of PPS6 states: 'A sequential approach should be applied in selecting appropriate sites for allocation where identified need is to be met'. In this section we provide our assessment of opportunities that may offer potential to meet a proportion of

the floorspace capacity that we have identified, in accordance with the sequential approach to site selection as set out in PPS6 (see Section 2 of this report).

- 9.21 In applying the sequential approach to site selection, paragraph 2.45 of PPS6 requires local authorities, developers and operators to be flexible and realistic in the identification of sites for new retail developments. Paragraphs 2.49 and 3.16 of PPS6 call for more efficient design, layout and store configurations in retail development, greater use of multi-storey developments and more efficient car parking.
- 9.22 Paragraph 3.19 of PPS6 also requires that, in considering sites for retail development, local authorities give consideration to the suitability, viability for the proposed use and likelihood of becoming available '*within a reasonable period of time*'. We take each of these requirements into account in providing our assessment of potential development opportunities.
- 9.23 For the reasons elicited elsewhere in this report, we consider that most of the identified additional comparison sector floorspace should be directed to - and due to market forces will in any case make its way to - Wisbech and March as the catchment area's two principal towns. Moreover, we have not identified any interest in Whittlesey or Chatteris from comparison sector operators, and operator demand in these centres is likely to be confined to independent operators that serve a predominantly localised catchment.
- 9.24 There is confirmed operator demand in both Wisbech and March from a range of prominent comparison retail operators, including a number of retailers in the key fashion sub-sector. We have also identified potential interest in Fenland from at least two supermarket operators - over and above the current application by Tesco to extend its store at Cromwell Road in Wisbech - including a superstore operator with a potential interest in Wisbech and a discount operator which cited Wisbech, Whittlesey and Chatteris as potential investment locations. A range of high-profile food and drink operators are also interested in Wisbech (in particular) and March according to the FOCUS requirements database.
- 9.25 The level of operator interest that we have identified for Wisbech and March is encouraging. We are confident that if a major new development scheme (or schemes) emerged, the number of retailer and leisure operator requirements for the two towns would increase further. If this operator demand was satisfied then both Wisbech and March would be better equipped to meet the retail needs of local residents and compete more effectively with neighbouring centres, thus helping to increase the proportion of comparison expenditure that is retained within Fenland's overall catchment area (OCA) which at 28 per cent is low.
- 9.26 Similarly, there is a need for additional convenience sector provision in appropriate locations and of an appropriate scale that could help to increase the OCA's convenience sector retention rate, which at 62 per cent is modest and capable of improvement.

Consideration of Development Opportunities

Wisbech

- 9.27 As we demonstrated in Section 5, available (vacant) retail units in Wisbech town centre are typically small and are therefore not attractive to operators that have an interest in being represented in the town. From our work for the District Council in June 2004 (in relation to the Nene Waterfront Development Brief) - and having undertaken field visits for this commission - we are not aware of any opportunities for retail development of any material scale within or adjacent to Wisbech town centre. Opportunities for intensification and/or geographic expansion of the town centre are heavily constrained by the town centre's conservation area status, as well as the presence of listed buildings and the River Nene. It may be possible to identify opportunities for the

amalgamation of existing town centre units, although this would not result in a material net gain in retail floorspace.

- 9.28 Because of the residential-led planning permissions that exist for the Nene Waterfront site, the area is unavailable and unsuitable for substantial quanta of comparison retail floorspace (although it is likely that a small element of retail, ancillary to the main residential uses, will be acceptable).
- 9.29 In the context described above - namely the absence of any opportunities for material levels of retail development within or on the edge of Wisbech town centre - we consider that the Council should give favourable consideration to the current application by Kensington and Edinburgh Estates Ltd for the redevelopment of the out-of-centre Wisbech Stadium site, the main components of which are as follows:
- some 9,939 sq.m (106,983 sq.ft) gross of non-food bulky goods retail, including a 2,322 sq.m (gross) DIY store with an ancillary garden centre of 1,114 sq.m gross (11,991 sq.ft) and six additional 'bulky goods' retail units with a combined gross floorspace of 6,503 sq.m (70,000 sq.ft);
 - commercial leisure uses (a 5-screen cinema at upper-floor level with a tenpin bowling facility at ground floor level); and
 - associated food and drink uses with a gross floorspace of 650 sq.m gross (7,000 sq.ft).
- 9.30 The proposed development would deliver around half of the total comparison retail floorspace requirement that we identified for the Fenland OCA in the period to 2021, as well as a cinema and food and drink uses, for which this study has identified both a quantitative and qualitative need in the District. Furthermore, the site is within an area of Wisbech that contains an established cluster of commercial uses, including the Belgrave Retail Park and the Tesco store. We therefore conclude that the scheme represents the most sequentially preferable opportunity for substantial non-food retail and leisure development in Wisbech.
- 9.31 We also consider that the Council should support a further currently proposed scheme in Wisbech, namely the application by DPP on behalf of Tesco Stores Ltd for a second extension and refurbishment of its store at Cromwell Road. The proposed extension has a gross floorspace of 2,381 sq.m (25,630 sq.ft). The net sales area of the store would increase by 1,814 sq.m (19,525 sq.ft), consisting of 860 sq.m net of additional convenience retail floorspace and 954 sq.m of additional comparison floorspace⁶⁷. This scale of floorspace is relatively modest in the context of the much greater quanta of floorspace requirements that we have identified. Whilst the store is in an out-of-centre location, it is within the same, established commercial area as the Stadium site on a key route into the town centre.

March

- 9.32 There are very few vacant units in March town centre and, like in Wisbech, those vacant units that do exist are small and unsuited to the floorspace requirements of modern national multiple retailers.
- 9.33 There may, however, be some potential for intensification in the area around the new library, south of the River Nene, which could provide a number of additional units, perhaps as part of a mix of uses. Further, more detailed work would be required in order to assess the suitability, viability and availability of a more precisely defined site, but in location terms that general area could be made to function as a complementary extension to the existing town centre core and could help to bolster the good level of vitality and viability in the centre.

⁶⁷ As specified in Table 7a of DPP's 'Appendix 4 - Economic Tables' volume.

Overall Summary and Key Recommendations

- 9.34 Our study has identified sufficient expenditure availability to support substantial quanta of additional comparison and convenience floorspace across the Fenland OCA area by 2021. In the comparison sector, centres and stores within the catchment area currently retain only 28 per cent the available comparison expenditure and so we recommend that the District Council's policy aspiration target should be to achieve an increase to the retention rate, to new level of 31 per cent by the year 2021. Our retail capacity work indicates that, under the 'increased retention' scenario, there is scope for an additional net sales area of around 18,800 sq.m (202,800 sq.ft).
- 9.35 For the convenience sector, we recommend that the Council's policy aspiration should be to increase the level of expenditure that is collectively retained by centres and stores located within the catchment, from the existing retention level - which is currently modest at 62 per cent, and capable of improvement - to a new level of 70 per cent by 2021. Our increased retention scenario forecasts indicate capacity for a net gain in convenience floorspace of around 3,700 sq.m (40,000 sq.ft) by the end of the study period if developed in superstore format, or around 6,800 sq.m (73,300 sq.ft) net if developed in smaller supermarket format.
- 9.36 Our work also indicates that, as a result of anticipated population growth and forecast increases in expenditure availability, there is scope for complementary facilities in the food and drink sector including a range of good-quality restaurants/cafés and bars, as well as several additional cinema screens and one or two neighbourhood bingo clubs.
- 9.37 Thus, we consider that the District Council should take a proactive approach to planning for new development in March as one of the catchment's two principal towns in order to accommodate the new comparison retail and related town centre uses necessary to materially increase expenditure retention and help to improve Fenland's standing in the wider sub-regional hierarchy. The area to the south of the river near to the new library appears to offer potential for such as scheme.
- 9.38 Wisbech town centre is more heavily constrained - by its topography and its environmentally sensitive nature - and so whilst the Council should promote and actively seek to fill the centre's void units, realistically there will be a need for substantial development in locations outside of the town centre in order to meet the floorspace requirements that we have identified. We therefore recommend that the current proposal to redevelop the Stadium site to provide a mix of uses including a substantial quantum of comparison retail floorspace should be viewed favourably.

Fenland District Council FENLAND DISTRICT RETAIL STUDY

Annex 1: Appendices to the Main Report



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CONTENTS

| | |
|------------|---|
| APPENDIX 1 | LIST OF STAKEHOLDER CONSULTEES |
| APPENDIX 2 | GOAD DEFINITION OF WISBECH TOWN CENTRE |
| APPENDIX 3 | PERFORMANCE ANALYSIS DATA |
| APPENDIX 4 | FOCUS RETAILER REQUIREMENTS (WISBECH AND MARCH) |
| APPENDIX 5 | FLOORSPACE DATA (WISBECH TOWN CENTRE) |

APPENDIX 1

LIST OF STAKEHOLDER CONSULTEES

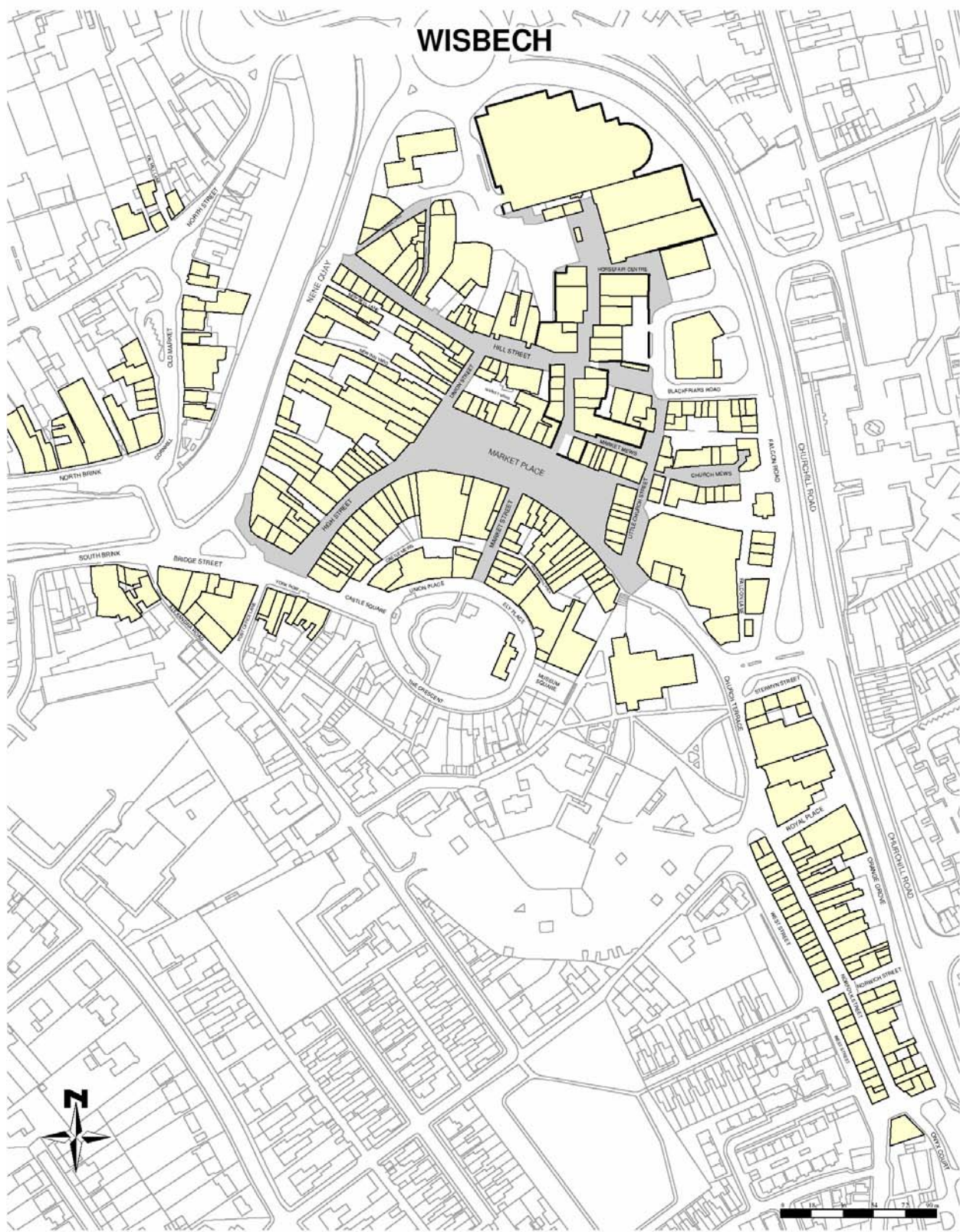
Roger Tym & Partners would like to thank the following stakeholders and other consultees who gave up their time and provided valuable information and input to this study:

- Collingwoods Estate Agents, March
- Dickens Watts & Dade, Peterborough
- March Chamber of Commerce
- Wisbech Chamber of Commerce

APPENDIX 2

GOAD DEFINITION OF WISBECH TOWN CENTRE

WISBECH




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APPENDIX 3

PERFORMANCE ANALYSIS DATA

Appendix 3, Table 1: Retail Rankings of Wisbech and March and Other Comparator Centres

| | MHE Classifn. | MHE 'Glam-Glum' Index* | MHE 2003/04 Rank+ | MHE 2000/01 Rank+ | MHE 1998/99 Rank+ | MHE 1995/96 Rank+ |
|-----------------|-----------------|------------------------|-------------------|-------------------|-------------------|-------------------|
| Cambridge | Regional | Glam | 68 | 47 | 41 | 9 |
| Kings Lynn | Regional | Mister Average | 132 | 132 | 123 | 124 |
| Peterborough | Regional | Mister Average | 46 | 42 | 40 | 35 |
| Bury St Edmunds | Sub Regional | Mister Average | 208 | 176 | 152 | 156 |
| Huntingdon | Major District | - | 336 | 357 | 324 | 352 |
| Diss | District | - | 546 | 572 | 659 | 587 |
| Ely | District | - | 367 | 406 | 431 | 448 |
| Haverhill | District | - | 546 | 421 | 431 | 437 |
| March | District | - | 565 | 670 | 614 | 541 |
| Newmarket | District | - | 374 | 347 | 327 | 339 |
| St Neots | District | - | 421 | 421 | 418 | 379 |
| Stowmarket | District | - | 565 | 497 | 505 | 522 |
| Thetford | District | - | 502 | 461 | 474 | 415 |
| Wisbech | District | - | 382 | 368 | 361 | 379 |
| St Ives (Cams) | Minor District | - | 602 | | | |

Notes:

Chatteris & Whittlesey not classified.

- * MHE's Glam-Glum index illustrates the relative attractiveness of a venue in terms of the quality of its fashion offer. Each retailer present in the fashion sector is given one of six ratings, from 'lower' to 'luxury'; the overall Glam-Glum rating of the centre then represents the average market position of that location's fashion offer.
- * Glasgow (highest ranking Major City) ranked 1; Reading (highest Major Regional) 11; Derby (highest Regional) 39; Kirkcaldy (highest Sub-Regional) 140; Rhyl (highest Major District) 223; Abergavenny (highest District) 360; Beckenham (highest Minor District) 575; Aberdeen, Bridge of Dee (highest Local) 912.

**Appendix 3, Table 2 - GOAD Diversity of Uses, Wisbech Town Centre
GOAD Survey Date - April 2005**

| Goad Code | Operator Type | GB Average | No. (Wisbech) | % (Wisbech) | Index (GB 100) |
|--|---|----------------|---------------|----------------|----------------|
| <i>Number (and %) of Convenience Goods Outlets</i> | | | | | |
| G1A | Bakers | 2.02% | 2 | 0.81% | 40 |
| G1B | Butchers | 0.86% | 3 | 1.22% | 142 |
| G1C | Greengrocers & fishmongers | 0.81% | 0 | 0.00% | 0 |
| G1D | Grocery and frozen foods* | 2.75% | 5 | 2.03% | 74 |
| G1E | Off-licences and home brew | 0.75% | 0 | 0.00% | 0 |
| G1F | Confectioners, tobacconists, newsagents | 2.18% | 3 | 1.22% | 56 |
| | TOTAL | 9.37% | 13 | 5.28% | 56 |
| <i>Number (and %) of Comparison Goods Outlets</i> | | | | | |
| G2A | Footwear & repair | 2.31% | 6 | 2.44% | 106 |
| G2B | Men's & boys' wear | 1.44% | 2 | 0.81% | 56 |
| G2C | Women's, girls, children's clothing | 5.48% | 11 | 4.47% | 82 |
| G2D | Mixed and general clothing | 3.27% | 9 | 3.66% | 112 |
| G2E | Furniture, carpets & textiles | 4.72% | 15 | 6.10% | 129 |
| G2F | Booksellers, arts/crafts, stationers/copy bureaux | 4.53% | 10 | 4.07% | 90 |
| G2G | Electrical, home entertainment, telephones and video | 5.27% | 13 | 5.28% | 100 |
| G2H | DIY, hardware & household goods | 3.06% | 5 | 2.03% | 66 |
| G2I | Gifts, china, glass and leather goods | 1.92% | 4 | 1.63% | 85 |
| G2J | Cars, motorcycles & motor accessories | 1.47% | 1 | 0.41% | 28 |
| G2K | Chemists, toiletries & opticians | 3.73% | 12 | 4.88% | 131 |
| G2L | Variety, department & catalogue showrooms | 1.10% | 4 | 1.63% | 148 |
| G2M | Florists and gardens | 1.11% | 3 | 1.22% | 110 |
| G2N | Sports, toys, cycles and hobbies | 2.74% | 7 | 2.85% | 104 |
| G2O | Jewellers, clocks & repair | 2.25% | 2 | 0.81% | 36 |
| G2P | Charity shops, pets and other comparison | 3.83% | 13 | 5.28% | 138 |
| | TOTAL | 48.23% | 117 | 47.56% | 99 |
| <i>Number (and %) of Service Uses</i> | | | | | |
| G3A | Restaurants, cafes, coffee bars, fast food & take-aways | 12.45% | 24 | 9.76% | 78 |
| G3B | Hairdressers, beauty parlours & health centres | 5.96% | 17 | 6.91% | 116 |
| G3C | Laundries & drycleaners | 1.06% | 2 | 0.81% | 77 |
| G3D | Travel agents | 1.92% | 5 | 2.03% | 106 |
| G3E | Banks & financial services (incl. accountants) | 4.77% | 13 | 5.28% | 111 |
| G3F | Building societies | 0.71% | 2 | 0.81% | 115 |
| G3G | Estate agents & auctioneers | 3.44% | 16 | 6.50% | 189 |
| | TOTAL | 30.31% | 79 | 32.11% | 106 |
| <i>Number (and %) of Miscellaneous Uses</i> | | | | | |
| G4A | Employment, careers, Post Offices and information | 1.54% | 7 | 2.85% | 185 |
| G4B | Vacant units (all categories) | 10.57% | 30 | 12.20% | 115 |
| | TOTAL | 12.11% | 37 | 15.04% | 124 |
| | GRAND TOTAL | 100.00% | 246 | 100.00% | |

* Includes 2 supermarkets (Iceland and Somerfield)

Appendix 3, Table 3 - Retailer Requirements for Wisbech and Comparator Centres, October 2003 to October 2005

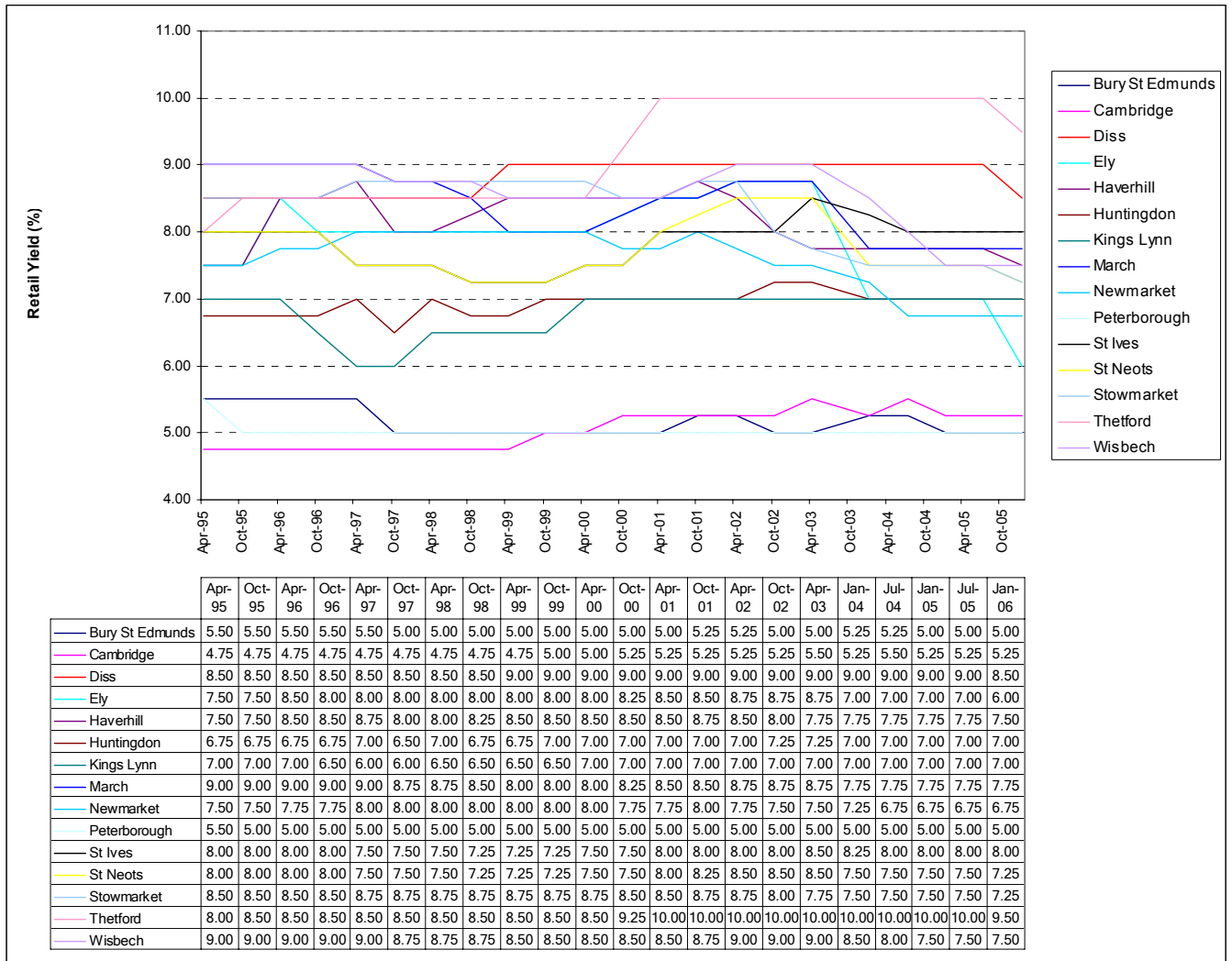
| | Oct-03 | Apr-04 | Oct-04 | Apr-05 | Oct-05 |
|-----------------|------------|--------|-----------|-----------|------------|
| Bury St Edmunds | 56 | 57 | 58 | 59 | 68 |
| Cambridge | 192 | 178 | 184 | 201 | 203 |
| Diss | 9 | 9 | 11 | 11 | 10 |
| Ely | 9 | 10 | 11 | 14 | 19 |
| Haverhill | 10 | 6 | 7 | 6 | 6 |
| Huntingdon | 29 | 27 | 28 | 29 | 36 |
| Kings Lynn | 51 | 41 | 40 | 41 | 39 |
| Newmarket | 27 | 23 | 27 | 27 | 33 |
| Peterborough | 111 | 95 | 96 | 104 | 100 |
| St Ives | 7 | 7 | 13 | 13 | 15 |
| St Neots | 16 | 16 | 17 | 18 | 21 |
| Stowmarket | 7 | 5 | 8 | 10 | 13 |
| Thetford | 10 | 9 | 10 | 12 | 18 |
| Wisbech | 11 | 13 | 12 | 13 | 18 |

Source: FOCUS Town Reports, June 2006

Notes:

Town's highest number of requirements in **bold**
 Historical requirements data are not available for March, Whittlesey or Chatteris

Appendix 3, Figure 1 – Retail Yield Movements April 1995 to January 2006, Wisbech and March and Comparator Centres

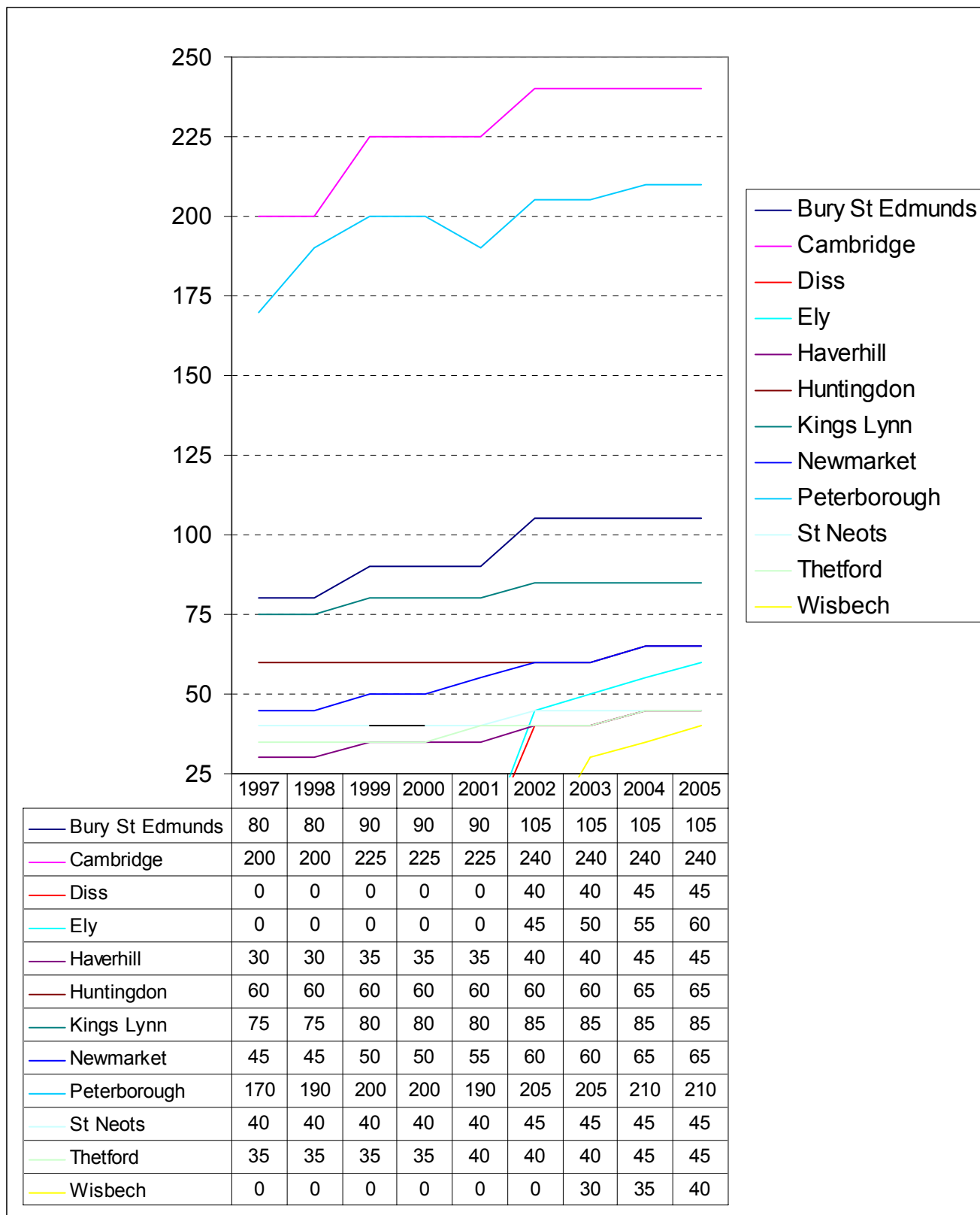


Source: Property Market Report, Valuation Office (January 2006)

Notes: Published yield data are not available for Chatteris or Whittlesey.

Thetford April 02-July 05 figure is >=10.00 (figures higher than this not recorded by Valuation Office)

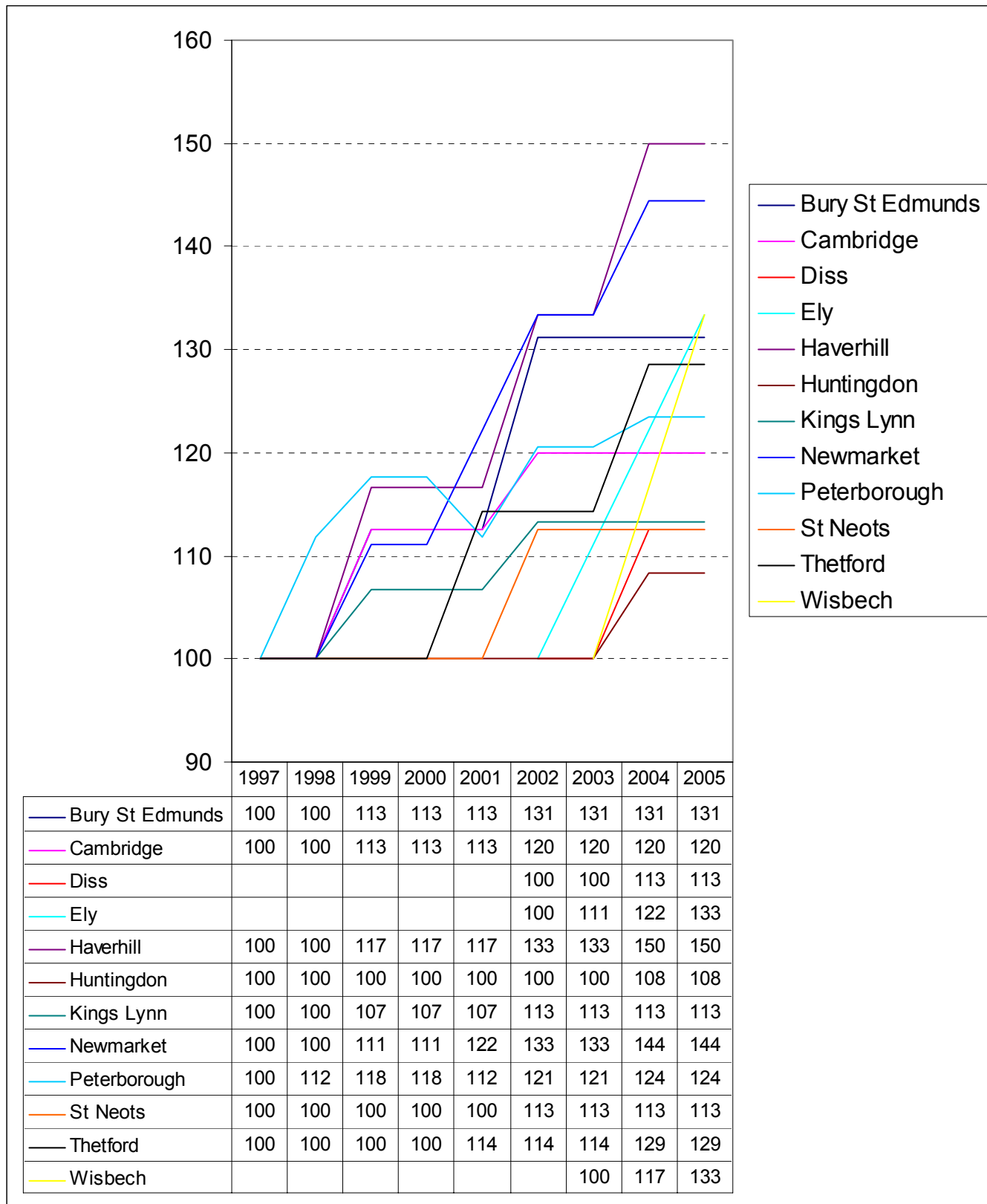
Appendix 3, Figure 2 - Absolute Zone A Rental Value Movements 1997 to 2005, Wisbech and Comparator Centres



Source: *In-Town Retail Rents*, Colliers Conrad Ritblat Erdman

Note: Published rental data are not available for the Fenland study centres of March, Chatteris or Whittlesey, or for the comparator centres of Stowmarket and St Ives

Appendix 3, Figure 3 - Index of Zone A Rental Value Movements 1997 to 2005, Wisbech and Comparator Centres



Source: *In-Town Retail Rents*, Colliers Conrad Ritblat Erdman

Note: Published rental data are not available for the Fenland study centres of March, Chatteris or Whittlesey, or for the comparator centres of Stowmarket and St Ives

APPENDIX 4

FOCUS RETAILER REQUIREMENTS (WISBECH & MARCH)

FOCUS OPERATOR REQUIREMENTS : WISBECH (AT 27.06.06)

| | | | |
|-------------------------------|--|--------------------------|-------------------------|
| Company Name: | ASK CENTRAL PLC | Speciality: | CAFE/RESTAURANT/ BAR |
| Requirements: | 10 | Existing Outlets: | 175 |
| Requirement Size: | 2,500 - 5,000 sq ft | Use: | RETAIL |
| Outlets Required: | Aylesbury, Banbury, Barnet, Basildon, Bayswater, Bedford, Bicester, Billericay, Bishop's Stortford, Borough, Bournemouth, Braintree, Brentwood, Burnham On Sea, Cambridge, Chelmsford, Chingford, Ealing, Ely, Epping, Euston, Frinton On Sea, Gerrards Cross, Great Yarmouth, Greenwich, Guildford, Harlow, Hatfield, Holloway, Huntingdon, Kettering, Knightsbridge, Lakeside, Leigh On Sea, Leighton Buzzard, Letchworth, Maldon, Marylebone, Milton Keynes, Norwich, Peterborough, Petts Wood, Putney, Rayleigh, Rickmansworth, Romford, Southgate, St Albans, Stevenage, Stoke Newington, Stratford, Sudbury, Thame, Uxbridge, Walthamstow, Wickford, Willesden, Wimbledon, Winchmore Hill, Wisbech, Woodbridge | | |
| Location: | PRIME PITCH/HIGH STREET, GOOD 2NDARY/FRINGE PRIME, ESTABLISHED RETAIL PARK, N'BOURHOOD PARADES/ESTATES, LEISURE PARK/BUSINESS PARK | | |
| Tenure: | LEASE, PURCHASE | | |
| Use: | RETAIL, CLASS A3 | | |
| Notes: | The company is looking 2,500 to 5,000 sq ft (232 to 464.5 sq m) with a minimum 1,750 sq ft on the ground floor. Retail/Leisure Parks are of particular interest. Additional location requirements include Bicester Outlet Village, Borough Market, Broadgate, Canary Wharf, Cheapside, Ealing Broadway, Fenchurch Street, Gloucester Road, Queens Park, South Kensington and St Pancras. | | |
| Initial Research Date: | 14/10/2003 | Last Update Date: | 03/05/2006 |
| Agent: | RSA CHARTERED SURVEYORS | Tel: | 0207 935 7131 |
| | | Fax: | 0207 935 7611 |
| Address: | 3-5 Duke Street London W1U 3BA | Contact: | Mr RICHARD SIMMONDS |

| | | | |
|--------------------------|---|--------------------------|----------------------------|
| Company Name: | BATHSTORE.COM LTD | Speciality: | BATHROOMS FURNITURE |
| Requirements: | 3 | Existing Outlets: | 110 |
| Requirement Size: | 2,500 - 6,000 sq ft | Use: | RETAIL |
| Outlets Required: | Accrington, Aldershot, Alfreton, Altrincham, Andover, Ashton Under Lyne, Ayr, Banbury, Barking, Barnstaple, Barrow In Furness, Bathgate, Batley, Beverley, Bexleyheath, Bicester, Birkenhead, Bishop Auckland, Bishop's Stortford, Blackburn, Blackpool, Bognor Regis, Bootle, Boston, Bracknell, Bradford, Bridgend, Bridgwater, Bridlington, Bromley, Bury St Edmunds, Camberley, Carmarthen, Castleford, Chatham, Chichester, Chippenham, Chorley, Clacton On Sea, Clydebank, Corby, Coventry, Crawley, Cwmbran, Darlington, Derby, Dewsbury, Dorchester, Dover, Dumfries, Dunfermline, Dunstable, Durham, East Kilbride, Eastbourne, Elgin, Ellesmere Port, Enfield, Epsom, Evesham, Falkirk, Fareham, Farnborough, Farnham, Folkestone, Gillingham, Glenrothes, Gloucester, Gosport, Grantham, Gravesend, Grays, Greenock, Halifax, Hamilton, Harrow, Hartlepool, Hastings, Hatfield, Havant, Haverfordwest, Hayes, Hereford, High Wycombe, Hinckley, Hounslow, Irvine, Keighley, Kendal, Kettering, Kidderminster, Kilmarnock, King's Lynn, Kirkcaldy, Leicester, Leigh, Lichfield, Littlehampton, Livingston, Llandudno, Llanelli, Loughborough, Lowestoft, Luton, Mansfield, Margate, Merthyr Tydfil, Morecambe, Motherwell, Neath, Newark On Trent, Newton Abbot, North Shields, Northwich, Orpington, Paignton, Paisley, Penzance, Pontefract, Pontypridd, Poole, Redcar, Rochdale, Rotherham, Rugby, Runcorn, Salford, Salisbury, Scarborough, Scunthorpe, Sittingbourne, Skegness, Solihull, South Shields, Spalding, St Austell, St Helens, Stafford, Stirling, Stockport, Stockton On Tees, Stratford Upon Avon, Stroud, Sudbury, Sunderland, Sutton In Ashfield, Swansea, Tamworth, Telford, Torquay, Trowbridge, Truro, Uxbridge, Wakefield, Walsall, Warrington, Washington, Waterloo, Watford, Wellingborough, Welwyn Garden City, Wembley, West Bromwich, Weston Super Mare, Weymouth, Wigan, Winchester, Windsor, Wisbech, Woking, Wolverhampton, Workington, Worksop, Yeovil | | |
| Amenities: | IN TOWN, Car Parking | | |
| Location: | PROMINENT/BUSY MAIN ROAD, ESTABLISHED RETAIL PARK, EDGE OF TOWN | | |
| Tenure: | LEASE | | |

Use: RETAIL, CLASS A1
Notes: The company is looking for 2,500 to 6,000 sq ft A1 retail or A1 Bulky Goods Retail on high visibility sites in prominent locations. It is interested retail parks, roadside, edge of town and town centre locations.

Initial Research Date: 17/02/2003
Last Update Date: 20/06/2006
Agent: HARTNELL TAYLOR COOK LLP
Tel: 020 7409 3707
Fax:
Address: 12-13 Conduit Street
London
W1R 9TG
Contact: MR Neil Perrin

Company Name: BON MARCHE LTD
Speciality: WOMEN'S WEAR
Requirements: 7
Existing Outlets: 250
Requirement Size: 2,000 - 3,500 sq ft
Use: RETAIL
Outlets Required: Bishop's Stortford, Brentwood, Bury St Edmunds, Cambridge, Hereford, Hitchin, Huntingdon, King's Lynn, Letchworth, Lowestoft, Milton Keynes, Newmarket, Rayleigh, Stevenage, Sudbury, Wisbech
Amenities: Ancillary Storage Required, Ground Floor Only
Location: GOOD 2NDARY/FRINGE PRIME
Tenure: LEASE
Use: RETAIL, CLASS A1
Notes: The company wants 500-1,500 sq ft ancillary space and an ideal internal width of 30-35 ft (minimum 25 ft). All busy towns will be considered throughout the UK.

Initial Research Date: 27/02/2003
Last Update Date: 31/10/2005
Agent: COLLIERS CRE
Tel: 020 7344 6537
Fax: 020 7409 3124
Address: 9 Marylebone Lane
London
W1M 6HL
Contact: Mr CAROLINE WALLACE

Company Name: EDINBURGH WOOLLEN MILL LTD
Speciality: KNITWEAR
Requirements: 1
Existing Outlets: 150
Address: Edinburgh Woollen Mill Ltd
Waverley Mills
Langholm
DG13 0EB
Contact: Mr MICHAEL TIFFEN
Email: michael.tiffin@ewm.co.uk
Tel: 013873 82829
Fax: 013873 82831
Requirement Size: 2,000 sq ft
Use: RETAIL
Outlets Required: Abingdon, Alnwick, Amersham, Arnold, Battle, Beccles, Biggleswade, Boscombe, Bourne, Burgess Hill, Cleveleys, Clitheroe, Cromer, Deal, Devizes, Didcot, Diss, Droitwich, Dunfermline, East Kilbride, Epping, Esher, Falkirk, Farnborough, Finchley, Fleet, Glenrothes, Great Yarmouth, Greenock, Hailsham, Harpenden, High Wycombe, Hitchin, Horncastle, Hove, Huntingdon, Kenilworth, Keynsham, Kirkcaldy, Knutsford, Largs, Leighton Buzzard, Leominster, Lewes, Littlehampton, Lowestoft, Maldon, March, Montrose, Morpeth, Nailsea, Newark On Trent, Oakham, Ormskirk, Reigate, Ringwood, Romsey, Saffron Walden, Shirley (West Midlands), St Austell, Stirling, Stourbridge, Surbiton, Teddington, Tenby, Tenterden, Thame, Trowbridge, Uttoxeter, Wallasey, Wallingford, Walton On Thames, Wantage, Ware, Whitley Bay, Wisbech, Witham, Witney, Woodbridge
Location: PRIME PITCH/HIGH STREET, GOOD 2NDARY/FRINGE PRIME
Tenure: LEASE, PURCHASE

Use: RETAIL, CLASS A1
Notes: The company is looking for 1,500 to 3,000 sq ft (139 to 279 sq m) ground floor sales with 500 to 1,000 sq ft (46.5 to 93 sq m) ancillary space. Company website www.ewm.co.uk.

Initial Research Date: 20/10/1999 **Last Update Date:** 21/03/2006

Company Name: ETHEL AUSTIN LTD **Speciality:** CLOTHING

Requirements: 5 **Existing Outlets:** 290

Requirement Size: 2,500 - 5,000 sq ft **Use:** RETAIL

Outlets Required: Abergavenny, Abingdon, Acocks Green, Alfreton, Allestree, Alvaston, Ashbourne, Ashby De La Zouch, Bearwood, Beaumont Leys, Bedford, Beeston, Belper, Bicester, Birmingham, Blaby, Bloxwich, Boston, Brackley, Bromsgrove, Brownhills, Cannock, Cheltenham, Chipping Norton, Cirencester, Coalville, Coventry, Daventry, Didcot, Droitwich, Evesham, Gloucester, Grantham, Great Barr, Halesowen, Hanley, Harborne, Hucknall, Huntingdon, Kenilworth, Kidderminster, Kidsgrove, Kings Heath, Leamington Spa, Leek, Leicester, Leighton Buzzard, Lichfield, Long Eaton, Loughborough, Louth, Macclesfield, Mansfield, March, Market Harborough, Matlock, Melton Mowbray, Milton Keynes, Monmouth, Newark On Trent, Newport Pagnell, Northampton, Nottingham, Nuneaton, Oadby, Oakham, Oxford, Pershore, Peterborough, Redditch, Ripley, Rugby, Rushden, Sheffield, Sheldon, Shirley (West Midlands), Skegness, Sleaford, Smethwick, Solihull, Spalding, St Ives (Cambs), St Neots, Stamford, Stapleford, Stourport On Severn, Stow On The Wold, Stratford Upon Avon, Stroud, Sutton Coldfield, Sutton In Ashfield, Swindon, Tamworth, Tewkesbury, Uttoxeter, Walsall, Wantage, Warwick, Wellingborough, West Bridgford, Wigston, Wisbech, Witney, Wolverhampton, Worksop, Yardley, Yate

Amenities: Ancillary Storage Required

Location: PRIME PITCH/HIGH STREET, GOOD 2NDARY/FRINGE PRIME

Tenure: LEASE

Use: RETAIL, CLASS A1

Notes: The company is also interested in Birmingham city centre, Perry Bar (Birmingham), Claycross, Coventry city centre, Cannon Park (Coventry) Jubilee Crescent (Coventry), Leicester city centre, Malvern, Northampton city centre, Weston Favell (Northampton), Nottingham city centre, Mapperley and Crystal Peaks (Sheffield). Other locations in the Midlands may be considered where it doesn't already have representation.

Initial Research Date: 21/08/2003 **Last Update Date:** 13/03/2006

Agent: SALWAY BRADBURY **Tel:** 0121 707 4858
Fax: 0121 708 0506

Address: 58 Warwick Road **Contact:** Mr Ken Salway
Solihull
B92 7JJ

Company Name: HOLLAND & BARRETT LTD **Speciality:** HEALTH FOODS

Requirements: 2 **Existing Outlets:** 450

Requirement Size: 1,000 - 1,500 sq ft **Use:** RETAIL

Outlets Required: Braintree, Bridgnorth, Havant, Haverhill, Henley On Thames, Leigh, Leighton Buzzard, Littlehampton, Loughborough, Melton Mowbray, Oswestry, Penrith, St Neots, Sudbury, Wellingborough, Widnes, Wilmslow, Wisbech

Amenities: Ancillary Storage Required, Ground Floor Only

Location: PRIME PITCH/HIGH STREET, GOOD 2NDARY/FRINGE PRIME

Tenure: LEASE

Use: RETAIL, CLASS A1

Notes: The company wants 500-600 sq ft ancillary space on ground, basement or first floor. It is interested in High Street (Bridgnorth), Market Square (Loughborough), High Street (Melton Mowbray), The Cross (Oswestry), Corn Lane/Cheese Lane (Wellingborough) Bury Street (Abingdon), East Street (Havant), Bell Street (Henley), High Street (Littlehampton), George Yard (Braintree), East Street (Haverhill), High Street

(Leighton Buzzard), High Street (St Neots), North Street/Market Hill (Sudbury) and Horsefair/Market Place (Wisbech). Other towns considered. Also contact Simon Turpin on 020 7629 6912/simon.turpin@kingsturge.com or Nick Webb on 020 7529 6813/nick.webb@kingsturge.com

Initial Research Date: 12/02/2004 **Last Update Date:** 07/03/2006
Agent: KING STURGE **Tel:** 020 7318 4314
Fax: 020 7493 3581
Address: 7 Stratford Place **Contact:** MR PAUL FAULKNER
London
W1C 1ST

Company Name: KFC (GB) LTD **Speciality:** FAST FOOD/TAKEAWAY OUTLETS
Requirements: 11 **Existing Outlets:** 500
Requirement Size: 2,550 - 2,900 sq ft **Use:** RETAIL
Outlets Required: Abingdon, Alfreton, Arnold, Aylesbury, Banbury, Basildon, Beaumont Leys, Bedford, Beeston, Bicester, Billericay, Brentwood, Bury St Edmunds, Cambridge, Chelmsford, Cheshunt, Coalville, Colchester, Daventry, Derby, Grantham, Great Yarmouth, Hadleigh, Harlow, Haverhill, Hemel Hempstead, Hertford, High Wycombe, Hitchin, Ilkeston, Ipswich, King's Lynn, Leicester, Leighton Buzzard, Letchworth, Lincoln, Luton, Melton Mowbray, Milton Keynes, Northampton, Norwich, Nottingham, Oadby, Oxford, Peterborough, Rayleigh, Skegness, Southend, Spalding, St Albans, Thetford, Wellingborough, West Bridgford, Westcliff On Sea, Wigston, Wisbech, Witney, Worksop, Wymondham
Amenities: Car Parking For 20-100 Cars
Location: PROMINENT/BUSY MAIN ROAD, LEISURE PARK/BUSINESS PARK, ESTABLISHED RETAIL PARK
Tenure: LEASE, PURCHASE
Use: RETAIL, CLASS A3
Notes: This is a drive thru requirement. The company wants patio area for external seating and future expansion. For the 70 seater unit, it wants 2,550 sq ft and 35 car parking spaces. For the 100 seater, it wants 2,900 sq ft and 50 car parking spaces. It is also interested in Fosse Park (Leicester), Hamilton (Leicester), Dereham, Alfreton Road (Nottingham), Carleton (Nottingham) and Colwick (Nottingham).

Initial Research Date: 14/02/2003 **Last Update Date:** 20/01/2006
Agent: DODSON JONES **Tel:** 01223 368468
Fax:
Address: 4 Hills Road **Contact:** Mr Edward Dodson
Cambridge
CB2 1JP

Company Name: PHONES 4U LTD **Speciality:** MOBILE PHONES
Requirements: 1 **Existing Outlets:** 353
Requirement Size: 600 - 1,500 sq ft **Use:** RETAIL
Outlets Required: Aberdeen, Aberystwyth, Abingdon, Acton, Alfreton, Alton, Amersham, Arbroath, Balham, Ballymena, Beaconsfield, Beckton, Belfast, Berkhamsted, Berwick Upon Tweed, Bexhill, Bicester, Birmingham, Bishop's Stortford, Blackheath, Blackwood, Blyth, Bognor Regis, Boscombe, Bournemouth, Bracknell, Bradford, Braintree, Brentwood, Bridlington, Bristol, Brixton, Bromley, Buxton, Caerphilly, Camborne, Cardiff, Caterham, Chepstow, Chertsey, Cheshunt, Chester Le Street, Christchurch, Cirencester, Clacton On Sea, Colwyn Bay, Congleton, Consett, Covent Garden, Craigavon, Cramlington, Dalston, Deal, Devizes, Docklands, Dorchester, Dudley, Dulwich, Eastleigh, Edgware, Edinburgh, Edmonton, Elephant & Castle, Enniskillen, Epping, Esher, Exeter, Exmouth, Falmouth, Farnham, Felixstowe, Finchley, Gillingham, Godalming, Goole, Gosport, Great Yarmouth, Greenford, Greenwich, Guildford, Hampstead, Hatfield, Haverfordwest, Haverhill, Hayes, Haywards Heath, Henley On Thames, Hertford, Hexham, Hinckley, Hitchin, Hornchurch, Hull, Islington, Kingsbury, Leeds, Leicester, Leighton Buzzard, Lichfield, Littlehampton, Liverpool, Llanelli, Loughborough, Lynton, Maldon, Manchester, Market Harborough, Marlow, Melton Mowbray, Mill Hill, Monmouth, Morpeth, Newark On Trent, Newcastle Under Lyme,

Newcastle Upon Tyne, Newmarket, Newport (Isle Of Wight), Newquay, Newton Abbot, Newtownards, North Shields, Northallerton, Northwich, Notting Hill, Nottingham, Ormskirk, Orpington, Oswestry, Oxford, Penrith, Penzance, Peterborough, Petersfield, Plymouth, Portsmouth, Potters Bar, Ramsgate, Rayleigh, Reading, Rickmansworth, Ringwood, Ripon, Romsey, Rugeley, Ruislip, Saffron Walden, Salford, Selby, Sheerness, Sheffield, Southall, Southgate, Spalding, St Albans, St Austell, Stafford, Stamford, Surbiton, Swanley, Swiss Cottage, Teddington, Tewkesbury, Thetford, Tiverton, Tonbridge, Torquay, Trafford Centre, Upminster, Uttoxeter, Wallsend, Waltham Cross, Walton On Thames, Wandsworth, Wells, Welwyn Garden City, West End, Weybridge, Whitley Bay, Widnes, Wigston, Winsford, Wisbech, Witney, Wokingham, Workington, Worksop

Location: PRIME PITCH/HIGH STREET, IN-TOWN SHOPPING CENTRE, OUT-OF-TOWN SHOP. CENTRE, ESTABLISHED RETAIL PARK

Tenure: LEASE

Use: RETAIL, CLASS A1

Notes: The company is looking for 600 to 1,500 sq ft (55 to 140 sq m) retail space. In London, it is interested in Triangle Retail Park, the Glades, Bishopsgate, Canary Wharf, Fenchurch Street, Liverpool Street, Surrey Quays and other central locations. Elsewhere, it is interested in the Bluewater Park, Castle Point (Bournemouth), Thanet, London Road (Portsmouth), the Oracle (Reading), Central Bristol, Liverpool, Manchester Sheffield and Belfast, Quayside Park, The Fort (Birmingham), Fosse Park (Leicester), Serpentine Green (Peterborough), Cheshire Oaks, Forestside (Belfast), Connswater, Cameron Toll (Edinburgh) The Lowry (Salford) and the Craigavon Centre. Also contact: Graham Phillips on 020 7493 4455/graham@morganwilliams.co.uk. Also contact joint agents David Gooch (020 7647 4808/david.gooch@gcw.co.uk), Simon Morris (020 7647 4802/simon.morris@gcw.co.uk) or Simon Odell (020 7647 4810/simon.odell@gcw.co.uk) at Gooch Cunliffe Whale. Also contact Stephen Boyce (01782 677 406/stephen.boyce@phones4u.co.uk), Irvin Capper (07770 522 776/irvin.capper@phones4u.co.uk)

Initial Research Date: 19/01/2004 **Last Update Date:** 18/04/2006

Agent: MORGAN WILLIAMS COMMERCIAL LLP **Tel:** 0207 493 4455
Fax: 0207 499 7643

Address: 45 Maddox Street
London
W1S 2PE **Contact:** Mr JONATHAN DOYLE

Agent: GOOCH CUNLIFFE WHALE LTD **Tel:** 020 7647 4808
Fax:

Address: Allan House
10 John Princes Street
London
W1G 0JW **Contact:** Mr DAVID GOOCH

Company Name: PIZZA HUT (UK) LTD **Speciality:** CAFE/RESTAURANT/
BAR

Requirements: 5 **Existing Outlets:** 500

Address: 1 Imperial Place
Maxwell Road
Borehamwood
WD6 1JN **Contact:** Mr NICK HEMSTOCK

Email: nick.hemstock@pizzahut.co.uk **Tel:** 07971 795 567

Requirement Size: 3,189 - 3,500 sq ft **Use:** RETAIL

Outlets Required: Aberdare, Aberystwyth, Abingdon, Accrington, Aldershot, Altrincham, Andover, Arbroath, Arnold, Bangor (Gwynedd), Bath, Berwick Upon Tweed, Bexhill, Bicester, Biggleswade, Bishopbriggs, Blackburn, Bletchley, Bodmin, Bradford, Brighton, Bromborough, Bulwell, Burnley, Burton On Trent, Bury St Edmunds, Chatham, Chelmsford, Cheshunt, Cirencester, Corby, Cowley, Cribbs Causeway (The Mall), Darlington, Denton, Dewsbury, Douglas, Dover, Dumbarton, Dumfries, Dunstable, Eastleigh, Eastwood, Edmonton, Elgin, Ely, Evesham, Fareham, Farnborough, Farnham, Felixstowe, Folkestone, Fort William, Galashiels, Gillingham, Great Yarmouth, Greenock, Grimsby, Guildford, Handforth, Harrogate, Hastings, Hatfield, Havant, Hertford, Horsham, Hove, Huntingdon, Ilkeston, Irvine, Kendal, Killingworth, Knaresborough, Leamington Spa, Leatherhead, Lichfield, Long Eaton, Luton, Macclesfield, Maidstone, Market Harborough, Meadowhall, Melton Mowbray, Milton Keynes, Motherwell, New Malden, Newark On Trent, Newmarket, Newquay, Newton Abbot, Northwich, Paignton, Penrith, Penzance, Perth, Prestwich, Redditch, Redhill, Redruth, Rhyl, Ringwood, Romford, Rugeley, Sale, Salisbury, Scarborough, Selly Oak, Sevenoaks, Sleaford, Slough, Solihull, Southampton, Southend, Spalding, St Albans, Stafford, Stamford, Stourbridge, Stowmarket, Stratford Upon Avon, Stroud, Sunbury, Sunderland, Surbiton, Sutton, Telford,

Location: Thetford, Tonbridge, Torquay, Trowbridge, Tunbridge Wells, Warwick, Washington, Waterlooville, Weymouth, Winchester, Wisbech, Wolverhampton, Workington, Worksop
Tenure: GOOD 2NDARY/FRINGE PRIME, PROMINENT/BUSY MAIN ROAD, LEISURE PARK/BUSINESS PARK, ESTABLISHED RETAIL PARK
Use: LEASE, PURCHASE
Notes: RETAIL, CLASS A3

The company requires stand alone restaurants on retail and leisure parks or prominent roadside locations 3,189 sq ft or a minimum of 0.5 acre (including car parking). It is also interested in South Aberdeen; Bedford Interchange; Upton (nr Birkenhead); Longbridge and the A45 (Birmingham); Blackburn East; Boldon; the A30 nr Camberley; North Cambridge; Sturry Road (Canterbury); North Cardiff; West Cheltenham; Broughton Park (Chester); South Colchester; South and West Coventry; West Derby; East Dundee; Craighleigh and Straiton (nr Edinburgh); Central Exeter; Team Valley; Anniesland and Pollockshaw nr Glasgow; St Andrew's Quay (Hull); Alwoodley (Leeds); Leicester North; Central Liverpool, Edge Lane and the A580; Purley Way, Staples Corner and the A3 (London); Malvern; Byker and Kingston Park near Newcastle; North and South Norwich, North and South Peterborough; Gunwharf Quays (Portsmouth); East Swindon and Greenbridge; the A50 (Uttoxeter); Watford South; Worthing East; Clifton Moor (York). Nick Hemstock acquires in the North, North Wales and Scotland. Also contact Alan Mason (07815 071 956/alan.mason@pizzahut.co.uk) for properties in the Midlands and East Anglia, or Mike Williams (07973 203 906/mike.williams@pizzahut.co.uk) for properties in the South West, South East, Essex and Kent.

Initial Research Date: 29/03/2005 **Last Update Date:** 12/04/2006

Company Name: PIZZA HUT (UK) LTD **Speciality:** CAFE/RESTAURANT/
BAR

Requirements: 5 **Existing Outlets:** 500

Requirement Size: 3,189 sq ft **Use:** RETAIL

Outlets Required: Aberdeen, Aberystwyth, Andover, Anniesland, Bangor (Down), Basingstoke, Bath, Bedford, Bexhill, Bicester, Birkenhead, Birmingham, Bishopbriggs, Blackburn, Bletchley, Borehamwood, Bournemouth, Bradford, Bridgwater, Brighton, Bromborough, Bromley, Burnley, Burton On Trent, Bury St Edmunds, Camberley, Cambridge, Cardiff, Chatham, Cheltenham, Cheshunt, Chester, Colchester, Corby, Coventry, Cramlington, Cribbs Causeway (The Mall), Darlington, Denton, Derby, Dewsbury, Didcot, Doncaster, Dumbarton, Dumfries, Eastleigh, Edinburgh, Edmonton, Epping, Fareham, Fort William, Galashiels, Gateshead, Glasgow, Gosport, Gravesend, Guildford, Guiseley, Handforth, Harrogate, Hastings, Hatfield, Havant, Haverfordwest, Hemel Hempstead, Hinckley, Hoddesdon, Horsham, Hove, Huntingdon, Irvine, Kendal, Killingworth, Leamington Spa, Leeds, Leicester, Leigh, Lichfield, Liverpool, Luton, Macclesfield, Maidstone, Milton Keynes, Motherwell, Newark On Trent, Newcastle Upon Tyne, Newquay, Norwich, Nottingham, Nuneaton, Oldbury, Oxford, Paignton, Penzance, Peterborough, Poole, Portsmouth, Prescot, Prestwich, Redditch, Redruth, Rhyl, Rochester, Scarborough, Slough, Solihull, Southampton, Southend, Spalding, Stafford, Stockton Heath, Stowmarket, Strood, Sunderland, Swindon, Tamworth, Telford, Thetford, Torquay, Trowbridge, Tunbridge Wells, Uttoxeter, Warwick, Washington, Waterlooville, Watford, West Bromwich, Weymouth, Whitstable, Wisbech, Woking, Wolverhampton, Worthing, York

Location: PROMINENT/BUSY MAIN ROAD, ESTABLISHED RETAIL PARK, LEISURE PARK/BUSINESS PARK
Tenure: LEASE
Use: RETAIL, CLASS A3

Notes: The company is looking for stand alone restaurants on retail and leisure parks or prominent roadside locations of 3,189 sq ft or a minimum of 0.5 acre (inc. car parking). They are particularly interested in The Interchange (Bedford), South West Birmingham, East Blackburn, Boldon, West Brighton, Filton, Cambridge North, Cardiff's Newport Road, Cheltenham's Tewkesbury Road, West Chester, South West Colchester, South and West Coventry, West Derby, West Doncaster, Straiton (Edinburgh), Team Valley and Pollock (Glasgow), Hayle, North and South Leeds, North Leicester, East and Central Liverpool, Old Kent Road and Staples Corner (London), Malvern, Byker, Norwich North and South, Peterborough North and South, Upton, South Watford and South Wolverhampton. Also contact David Marsden on 020 7317 3771 at Wilkenson Williams, Jack Campbell on 0131 220 3220 at Colliers CRE for Scottish locations and Brad Harvey (South) on 020 7534 8451 or David Bell (North) 0113 246 1161 at Donaldsons for locations in England and Wales. Company website www.pizzahutproperty.co.uk.

Initial Research Date: 27/06/2005 **Last Update Date:** 10/05/2006

Agent: WILKINSON WILLIAMS LTD **Tel:** 0207 317 3792
Fax:

Address: 26a Albemarle Street London **Contact:** Mr TIM HAYNS

W1S 4HY

Agent: COLLIERS CRE **Tel:** 0131 240 7526
Fax:
Address: 39 George Street **Contact:** Mr JACK CAMPBELL
Edinburgh
EH2 2HN
Agent: DONALDSONS **Tel:** 020 7534 8451
Fax:
Address: 48 Warwick Street **Contact:** Mr BRAD HARVEY
London
W1B 5NL

Company Name: PIZZAEXPRESS PLC **Speciality:** CAFE/RESTAURANT/
BAR
Requirements: 11 **Existing Outlets:** 300
Address: Pizza Express **Contact:** Mr MARC WARD
Union Park
1 Florence Way
Uxbridge
UB8 2LS
Email: marc.ward@pizzaexpress.com **Tel:** 01895 618 722
Requirement Size: 1,750 - 3,000 sq ft **Use:** RETAIL
Outlets Required: Andover, Arbroath, Ascot, Ashbourne, Baldock, Barnstaple, Basildon, Bath, Battle, Bearsden, Berwick
Upon Tweed, Billericay, Birmingham, Boston, Bowness On Windermere, Bradford, Bradford On Avon,
Brixton, Broadway, Burford, Burgess Hill, Bury, Carshalton, Chalfont St Peter, Cheam, Chertsey,
Christchurch, Clapham, Croydon, Devizes, Doncaster, Douglas, Epping, Esher, Ewell, Falmouth,
Fareham, Fleet, Gateshead, Glasgow, Glastonbury, Grantham, Haddington, Hastings, Havant,
Headingley, Herne Hill, Hornchurch, Hornsey, Huddersfield, Hungerford, Ilfracombe, Ilkley, Kendal,
Kensington, Kings Heath, Lewisham, Lichfield, Liverpool, Loughborough, Lymington, Maida Vale,
Maldon, Malton, March, Margate, Melton Mowbray, Midhurst, Morningside, Nantwich, Newcastle Under
Lyme, Newquay, Newton Abbot, Northallerton, Oban, Oxford, Peterborough, Richmond (Surrey),
Rickmansworth, Ringwood, Ripon, Rugby, Shaftesbury, Sherborne, Skipton, Solihull, Southampton,
Southfields, St Ives (Cornwall), St James's, St Neots, Stevenage, Stowmarket, Sudbury, Surbiton,
Tetbury, Thame, Thirsk, Tollcross, Tooting, Waterloo (Greater London), Wells, Weymouth, Willesden,
Wisbech, Witney, Wolverhampton, Woodstock, Wootton Bassett, Yarm
Amenities: Ancillary Storage Required, Ground Floor Only, Minimum Frontage 35 Ft+
Location: GOOD 2NDARY/FRINGE PRIME
Tenure: LEASE, PURCHASE
Use: RETAIL, CLASS A3
Notes: In London, the company is also interested in Clapham Common, Earlsfield, Edgware Road, Portobello,
Queens Park, South Kensington and Willesden Green. Elsewhere, it is interested in Great Dunnlow,
Prestbury, Salcombe, Glasgow's west end and Glasgow Victoria Street.
Initial Research Date: 14/01/2000 **Last Update Date:** 17/02/2006

Company Name: WORKS PUBLISHERS OUTLET (THE) **Speciality:** ARTIST MATERIALS
BOOKSELLERS
Requirements: 1 **Existing Outlets:** 220
Requirement Size: 1,500 - 2,500 sq ft **Use:** RETAIL

Outlets Required: Abergavenny, Aldershot, Antrim, Ashbourne, Ashford, Ashton Under Lyne, Ayr, Ballymena, Bangor (Down), Bangor (Gwynedd), Barking, Barnstaple, Barrow In Furness, Basingstoke, Bath, Bayswater, Belfast, Berwick Upon Tweed, Beverley, Bexleyheath, Bicester, Bishop's Stortford, Boscombe, Bournemouth, Bracknell, Bradford, Braintree, Brecon, Brentwood, Bridgend, Bridlington, Bristol, Bromley, Burnley, Bury St Edmunds, Caerphilly, Cambridge, Cannock, Cardigan, Castleford, Cheltenham, Chiswick, Clapham, Clifton (Avon), Coalville, Coleraine, Corby, Coventry, Cribbs Causeway (The Mall), Cumbernauld, Darlington, Docklands, Doncaster, Dorking, Dover, Dunfermline, Ealing, East Ham, East Kilbride, Edgware, Edinburgh, Eltham, Ely, Enfield, Epsom, Evesham, Exeter, Exmouth, Falmouth, Fareham, Farnborough, Farnham, Fleet, Folkestone, Gillingham, Glasgow, Gloucester, Gravesend, Great Yarmouth, Greenock, Guildford, Halesowen, Hamilton, Hammersmith, Harrow, Hartlepool, Hastings, Hexham, Hinckley, Horsham, Hounslow, Hove, Hull, Huntingdon, Ilford, Ilkley, Inverness, Islington, Keighley, Kettering, Kilmarnock, Kingston Upon Thames, Leeds, Leicester, Lisburn, Liverpool, Londonderry, Lowestoft, Lymington, Lytham St Anne's, Maidenhead, Maidstone, Manchester, Market Harborough, Melton Mowbray, Merthyr Tydfil, Middlesbrough, Mold, Monmouth, Motherwell, Neath, Newmarket, Newport (Isle Of Wight), Newport (Shropshire), Newquay, Newry, Newtown, Newtownabbey, Omagh, Orpington, Penzance, Plymouth, Pontypridd, Portadown, Putney, Redcar, Rhyl, Richmond (Surrey), Ross On Wye, Rotherham, Scarborough, Sheffield, Skegness, Skipton, South Shields, Southsea, Spalding, St Albans, St Andrews, St Austell, Staines, Stevenage, Stirling, Stratford, Streatham, Stroud, Sudbury, Sutton, Swindon, Taunton, Tiverton, Tooting, Trowbridge, Truro, Tunbridge Wells, Uttoxeter, Uxbridge, Victoria, Walthamstow, Warrington, Wellingborough, Wells, Welwyn Garden City, Weston Super Mare, Wigan, Wilmslow, Wimbledon, Wisbech, Witney, Woking, Wood Green, Woolwich, Worksop, Yate

Amenities: Ancillary Storage Required, Ground Floor Only

Location: PRIME PITCH/HIGH STREET, IN-TOWN SHOPPING CENTRE, GOOD 2NDARY/FRINGE PRIME, OUT-OF-TOWN SHOP. CENTRE

Tenure: LEASE, PURCHASE

Use: RETAIL, CLASS A1

Notes: The company wants to open 40 stores in 2006. The company wants from 500 sq ft ancillary space. It is also interested in Blanchardstown, Carlow, Cork, Dublin, Galway, Kilkenny, Limerick, Sligo, Tralee, Waterford and Wicklow in the Republic of Ireland. Bath, Cambridge, Cheltenham, Glasgow, Newport, Stirling and Swindon are relocations. Additional units are required in Coventry, Edinburgh, Exeter, Gloucester, Hull, Leeds, Liverpool, Manchester and Sheffield. Please only contact Adam Lazenbury with properties in the Midlands. For West Scottish properties contact Sheila Campbell (0141 226 5241/sheila.campbell@dtz.com). For East Scottish Properties contact David Conroy (0141 226 5241/david.conroy@dtz.com). For properties in Northern Ireland contact Paul Mulholland (028 9023 3455/paul.mulholland@dtz.com). Properties in Republic of Ireland contact Karl Stewart (+353 1 639 9347/karl.stewart@dtz.ie). For properties in the North East contact Richard Barker on 0113 254 3017 or richard.baker@dtz.com. For properties in the North contact Gary Compton on 0161 455 3775 or gary.compton@dtz.com. For properties in the South East contact Mark Painter on 020 7643 6517 or mark.painter@dtz.com. For properties in the South West and South Wales contact Spencer Wilson on 0117 900 4321 or spencer.wilson@dtz.com.

Initial Research Date: 11/07/2005

Last Update Date: 08/03/2006

Agent: DTZ DEBENHAM TIE LEUNG

Tel: 020 7643 6534
Fax: 020 7643 6431

Address: 1 Curzon Street
London
W1J 5HD

Contact: Mr KEVIN FARROW

Company Name: ZIZZI

Speciality: CAFE/RESTAURANT/
BAR

Requirements: 10

Existing Outlets: 500

Requirements: 10

Existing Outlets: N/A

Requirement Size: 3,000 - 5,000 sq ft

Use: RETAIL

Outlets Required: Aylesbury, Banbury, Barnet, Basildon, Bayswater, Bedford, Bicester, Billericay, Bishop's Stortford, Bournemouth, Braintree, Brentwood, Burnham On Sea, Cambridge, Chelmsford, Chingford, Ealing, Ely,

Epping, Euston, Frinton On Sea, Gerrards Cross, Great Yarmouth, Greenwich, Guildford, Harlow, Hatfield, Holloway, Huntingdon, Kettering, Knightsbridge, Lakeside, Leigh On Sea, Leighton Buzzard, Letchworth, Maldon, Marylebone, Milton Keynes, Norwich, Peterborough, Petts Wood, Putney, Rayleigh, Rickmansworth, Romford, Southgate, St Albans, Stevenage, Stoke Newington, Stratford, Sudbury, Thame, Uxbridge, Walthamstow, Wickford, Willesden, Wimbledon, Winchmore Hill, Wisbech, Woodbridge

Amenities:

IN TOWN

Location:

PRIME PITCH/HIGH STREET

Tenure:

LEASE, PURCHASE

Use:

RETAIL, CLASS A3

Notes:

The company wants a minimum of 1,750 sq ft arranged over the ground floor. Also looking in London for Borough Market, Broadgate, Canary Wharf, Cheapside, Ealing Broadway, Fenchurch Street, Gloucester Road, Queens Park, South Kensington and St Pancras.

Initial Research Date:

23/08/2004

Last Update Date:

03/05/2006

Agent:

RSA CHARTERED SURVEYORS

Tel:

0207 935 7131

Fax:

0207 935 7611

Address:

3-5 Duke Street
London
W1U 3BA

Contact:

Mr RICHARD
SIMMONDS

FOCUS OPERATOR REQUIREMENTS : MARCH (AT 27.06.06)

| | | | |
|-------------------------------|---|--------------------------|--------------------------|
| Company Name: | AGE CONCERN | Speciality: | CHARITY CHARITY SHOPS |
| Requirements: | 3 | Existing Outlets: | 132 |
| Requirement Size: | 650 - 900 sq ft | Use: | RETAIL |
| Outlets Required: | Abingdon, Alderley Edge, Amersham, Ashbourne, Ashford, Banbury, Bangor (Gwynedd), Barnet, Bath, Beaconsfield, Beeston, Beverley, Bexley, Bicester, Bitterne, Blackheath (West Midlands), Bourton On The Water, Brentwood, Bridgnorth, Bridgwater, Brighouse, Bulwell, Burnham, Buxton, Caerphilly, Camberley, Cardiff, Carlisle, Carmarthen, Caterham, Chesham, Clapham, Cleveleys, Colwyn Bay, Congleton, Cottingham, Cricklewood, Cwmbran, Derby, Dulwich, Durham, Eastcote, Edenbridge, Elephant & Castle, Ellesmere Port, Epping, Epsom, Evesham, Farnham, Farnworth, Gerrards Cross, Goole, Guildford, Halesowen, Handforth, Harpenden, Harpenden, Hartlepool, Hartlepool, Hayes, Headington, Hebden Bridge, Henley On Thames, Hesse, High Wycombe, Hucknall, Huntingdon, Huntingdon, Ivybridge, Kendal, Kentish Town, Keswick, Kidderminster, Kidlington, Kingsbury, Kingswinford, Knowle (West Midlands), Leicester, Leigh, Leighton Buzzard, Leighton Buzzard, Letchworth, Letchworth, Lewisham, Lichfield, Llandudno, Llanelli, Long Eaton, Loughton, Loughton, March, Market Drayton, Marlborough, Marple, Merthyr Tydfil, Middlewich, Minehead, Nantwich, Newark On Trent, Newport (Gwent), Norwich, Norwich, Peckham, Pendlebury, Pickering, Pontefract, Pontypool, Pontypridd, Poulton Le Fylde, Prestatyn, Preston, Putney, Reading, Reddish, Rhondda, Rhyl, Rotherham, Ruislip, Saffron Walden, Shanklin, Shepperton, Solihull, Southampton, Southwark, St Neots, Staines, Stockport, Stourbridge, Street, Sunbury, Sunderland, Sutton In Ashfield, Swansea, Swaythling, Swindon, Swinton, Tavistock, Teignmouth, Telford, Tetbury, Tewkesbury, Thornbury, Totnes, Trowbridge, Ulverston, Uxbridge, Wakefield, Wallsend, Walton On Thames, Wandsworth, Ware, Washington, Wembley, West Drayton, Westerham, Whitley Bay, Whitley Bay, Widnes, Wilmslow, Winsford, Witney, Wrexham, Yate | | |
| Amenities: | Ancillary Storage Required | | |
| Location: | PRIME PITCH/HIGH STREET, GOOD 2NDARY/FRINGE PRIME | | |
| Tenure: | LEASE | | |
| Use: | RETAIL, CLASS A1 | | |
| Notes: | The charity will take prime locations where possible. It wants 400 sq ft ancillary space. It will ideally pay between £15,000-£25,000 pax in rent. It wants 10 year leases, preferably with 5 year breaks. It is also interested in Clapham Junction, Ickenham, West Hampstead (London), Mere Green, Reading west or Friar Street, Solihull centre, Stow on the Green, Queens Road (Leicester), Sedgley, Abbots Langley, Buntingford, Toddington, Orton, Broughton, Chelford, Disley, Hoole, Pendleton, Prestbury and West Houghton. Also contact Philip Bell at Stephen Kane & Co (020 7224 0101). | | |
| Initial Research Date: | 31/12/2004 | Last Update Date: | 31/12/2004 |
| Agent: | STEPHEN KANE & CO | Tel: | 020 7224 0101 |
| | | Fax: | 020 7224 0406 |
| Address: | 61 Queen Anne Street London W1M 9LA | Contact: | MR PHILIP B |

REPORT : MARCH OPERATOR REQUIREMENTS : DETAILED REPORT (27.06.06)

| | | | |
|-------------------------------|--|--------------------------|---|
| Company Name: | BRITISH HEART FOUNDATION | Speciality: | CLOTHING ELECTRICAL/DURABLE GOODS FURNITURE |
| Requirements: | 2 | Existing Outlets: | 500 |
| Address: | Crown House Church Road Claygate KT10 0BF | Contact: | Mr Martin Howard |
| Email: | | Tel: | 01372 477 454 |
| Requirement Size: | 600 - 1,200 sq ft | Use: | RETAIL |
| Outlets Required: | <p>Abergele, Acton, Addlestone, Alexandria, Alnwick, Amersham, Annan, Arnold, Ashton In Makerfield, Atherton, Bacup, Bakewell, Barrhead, Battle, Bearsden, Bebington, Beccles, Bedlington, Belper, Benfleet, Berkhamsted, Biddulph, Bideford, Biggleswade, Billericay, Bingley, Birmingham, Bishop Auckland, Bitterne, Blackburn, Blandford Forum, Bodmin, Bolsover, Bournemouth, Braintree, Bramhall, Brecon, Bridgnorth, Bridport, Brixham, Bromley, Broughty Ferry, Brownhills, Broxburn, Buckley, Burgess Hill, Burnham On Sea, Caernarvon, Caldicot, Calne, Camberley, Cambridge, Camden, Cardiff, Cardigan, Carlisle, Carlton, Carluke, Carterton, Caterham, Chard, Cheadle, Chelsea, Chester Le Street, Chiswick, Chorlton Cum Hardy, Clevedon, Clitheroe, Cobham, Codsall, Colne, Corsham, Cowdenbeath, Cowes, Cramlington, Cranleigh, Crosby, Cross Gates, Crowborough, Crystal Palace, Darwen, Denny, Didsbury, Droitwich, Dronfield, Dursley, Ealing, East Dereham, East Ham, Eastwood, Ebbw Vale, Edgware, Edmonton, Enfield, Epping, Fakenham, Farnworth, Feltham, Ferndown, Finchley, Fleet, Fleetwood, Flint, Formby, Fort William, Frinton On Sea, Fulham, Glasgow, Glossop, Golders Green, Gosforth, Guisborough, Harpenden, Harwich, Haslemere, Hatfield, Hayling Island, Hazel Grove, Heanor, Hebburn, Helensburgh, Helston, Hemel Hempstead, Henley On Thames, Heswall, Hexham, Heywood, Hillsborough, Holyhead, Holywell, Hucknall, Huyton, Ilford, Ilfracombe, Inverurie, Isle Of Wight, Islington, Johnstone, Kenilworth, Kensington, Kidlington, Kidsgrove, Kilburn, Kingston Upon Thames, Knutsford, Ladbroke Grove, Lancing, Leatherhead, Ledbury, Leeds, Lewisham, Leyland, Leyton, Littlehampton, Liverpool, Loughton, Lymington, Malton, Manchester, March, Market Drayton, Marlow, Marple, Melksham, Mexborough, Middleton, Mildenhall, Milford Haven, Milngavie, Milton Keynes, Moreton, Morriston, Mountain Ash, Muswell Hill, Nailsea, Nairn, Neston, Newburn, Newcastle Upon Tyne, Newport (Shropshire), Newport Pagnell, Newquay, Newton Le Willows, Newtown, Northwood, Notting Hill, Nottingham, Oadby, Oban, Oldbury, Oxford, Pembroke, Penarth, Petersfield, Pinner, Pontypool, Porthcawl, Portishead, Portswood, Potters Bar, Poulton Le Fylde, Prestatyn, Prestwich, Prestwick, Queensway, Radlett, Rawtenstall, Rayleigh, Richmond (Surrey), Rickmansworth, Ringwood, Ripon, Rochford, Romsey, Ross On Wye, Royston, Royton, Ruislip, Runcorn, Rushden, Sale, Sandbach, Sandown Park, Seaham, Shanklin, Shaw, Sheffield, Shepherds Bush, Shepshed, Shoreham By Sea, Shotton, Slough, Smethwick, Solihull, Southgate, Southwark, Spennymoor, St Albans, St Ives (Cams), St Ives (Cornwall), Stanley, Stenhousemuir, Stevenston, Stourport On Severn, Stranraer, Streatham, Stretford, Sunbury, Swaffham, Swanage, Swinton, Tavistock, Telford, Tenby, Thame, Tiverton, Torpoint, Tottenham, Totton, Tredegar, Troon, Twickenham, Tyldesley, Ulverston, Urmston, Wadebridge, Walthamstow, Walton On Thames, Walton On Thames, Wandsworth, Wantage, Ware, Washington, Wellingborough, Wellington (Shropshire), Welwyn Garden City, Wembley, West Bridgford, Whitchurch (South Glam), Whitley Bay, Wickford, Wigston, Wimborne Minster, Wishaw, Witham, Witney, Wokingham, Wootton Bassett</p> | | |
| Amenities: | Ancillary Storage Required | | |
| Location: | PRIME PITCH/HIGH STREET, GOOD 2NDARY/FRINGE PRIME | | |
| Tenure: | LEASE | | |
| Use: | RETAIL, CLASS A1 | | |
| Notes: | <p>This is a requirement is for a clothing shop format. The charity wants a minimum of 600 sq ft with a back-up space of at least 400 sq ft. Typical good size is 1,200 sq ft. If basement space is used, must have secondary means of escape. It is also looking in Alsager, Ardrossan, Ash/Abercynon, Birmingham central, Birstall, Blairgowrie, Bonnyrigg, Boughton/Ollerton, Broomhill (Sheffield), Broxburn, Buckhaven, Burntwood, central Cardiff, Chryston, Connah's Quay, Crowthorne, Crystal Peaks (Sheffield), Ealing Broadway, Earl Shilton, East Looe, East Retford, Emsworth/Southbourne, Fawley, Forres, North End Road (Fulham), Girvan, Byres Road (Glasgow), Glossop/Hollingworth, Greasby/Moreton, Hadley, Hockley, Holloway Road (London), Horwich, Irlam, Kilburn High Road, Kilsuith, Kilwilling, Kings Road (Chelsea), Lakenheath, Larkhall, Leeds city centre, Littleborough, Liverpool central, Lymm, Madley, Manchester central, Mayfield, Milnrow, Newcastle city centre, Orrell, Summertown, Pebbles, Pembroke Dock, Polmont, Pontardawe/Clydach, Poyton, Ramsbottom, Rhosllanerchrugog, Shotton/Hawarden, Sompting/Lancing, Standish, Stockbridge, Streatham High Road, Tadley, Warsop, Westthoughton and Wombwell.</p> | | |
| Initial Research Date: | 02/07/2002 | Last Update Date: | 18/04/2006 |

| | | | |
|-------------------------------|--|--------------------------|----------------------------|
| Company Name: | CARD WAREHOUSE LTD | Speciality: | NEWSAGENT/CARDS /STATIONER |
| Requirements: | 1 | Existing Outlets: | 450 |
| Requirement Size: | 1,000 - 2,500 sq ft | Use: | RETAIL |
| Outlets Required: | Acocks Green, Alfreton, Alloa, Alnwick, Altrincham, Antrim, Armagh, Ashby De La Zouch, Ballymena, Bathgate, Bearsden, Beaumont Leys, Beeston, Bellshill, Belper, Beverley, Birmingham, Bishop Auckland, Bishopbriggs, Boston, Bridlington, Brighouse, Bromsgrove, Burton On Trent, Bury, Cannock, Carlisle, Chadderton, Cheadle, Chelmsley Wood, Chester Le Street, Cleethorpes, Cleveleys, Clitheroe, Coleraine, Colne, Consett, Craigavon, Cross Gates, Denton, Derby, Didsbury, Droylsden, Dumbarton, Dumfries, Dundee, Dungannon, Eastwood, Eccles, Edinburgh, Enniskillen, Fleetwood, Gainsborough, Glasgow, Glenrothes, Goole, Gosforth, Grangemouth, Halesowen, Harborne, Harrogate, Hazel Grove, Headingley, Heanor, Hexham, Hucknall, Kings Heath, Lanark, Leamington Spa, Leeds, Leek, Leith, Lichfield, Londonderry, Longbenton, Loughborough, Louth, Manchester, March, Marple, Melton Mowbray, Mexborough, Morley, Morpeth, Nelson, Newark On Trent, Newcastle Under Lyme, Newcastle Upon Tyne, Newry, Newton Aycliffe, Newtownabbey, Newtownards, Northallerton, Northallerton, Oadby, Omagh, Parkhead, Penrith, Portadown, Ripley, Ripon, Rochdale, Rugeley, Sale, Selby, Shawlands, Sheffield, Shipley, Shrewsbury, Skegness, Skipton, Sleaford, Solihull, Spalding, Spennymoor, Stafford, Stamford, Stirling, Sutton Coldfield, Swadlincote, Tynemouth, Urmston, Uttoxeter, Wallsend, Washington, Wellingborough, Wellington (Shropshire), West Bridgford, Whitehaven, Whitley Bay, Wigston | | |
| Amenities: | Ancillary Storage Required, Ground Floor Only | | |
| Location: | PRIME PITCH/HIGH STREET, IN-TOWN SHOPPING CENTRE, GOOD 2NDARY/FRINGE PRIME | | |
| Tenure: | LEASE | | |
| Use: | RETAIL, CLASS A1 | | |
| Notes: | The company wants 300-600 sq ft ancillary space. It is also interested in Cameron Toll (Edinburgh), Glasgow city centre, Byers Road (Glasgow), Parkhead Forge (Glasgow), Victoria Road (Glasgow), Manchester city centre, Seacroft (Leeds), Crystal Peaks (Sheffield), Byker (Newcastle upon Tyne), Newcastle upon Tyne city centre, Birmingham city centre, Weston Favell (Northampton), Abbey Centre (Northern Ireland), Dundalk and Forestside. | | |
| Initial Research Date: | 19/09/2003 | Last Update Date: | 05/05/2006 |
| Agent: | CAPITAL RETAIL | Tel: | 0115 950 9000 |
| | | Fax: | 0115 948 4076 |
| Address: | 19 The Ropewalk Nottingham NG1 5DU | Contact: | Mr PETER SHORT |
| Agent: | CAPITAL RETAIL | Tel: | 0115 950 9000 |
| | | Fax: | |
| Address: | 19 The Ropewalk Nottingham NG1 5DU | Contact: | Mr SIMON HILL |

Company Name: EDINBURGH WOOLLEN MILL LTD **Speciality:** KNITWEAR
Requirements: 1 **Existing Outlets:** 150
Address: Edinburgh Woollen Mill Ltd
Waverley Mills
Langholm
DG13 0EB **Contact:** Mr MICHAEL TIFFEN
Email: michael.tiffin@ewm.co.uk **Tel:** 013873 82829
Fax: 013873 82831
Requirement Size: 2,000 sq ft **Use:** RETAIL
Outlets Required: Abingdon, Alnwick, Amersham, Arnold, Battle, Beccles, Biggleswade, Boscombe, Bourne, Burgess Hill, Cleveleys, Clitheroe, Cromer, Deal, Devizes, Didcot, Diss, Droitwich, Dunfermline, East Kilbride, Epping, Esher, Falkirk, Farnborough, Finchley, Fleet, Glenrothes, Great Yarmouth, Greenock, Hailsham, Harpenden, High Wycombe, Hitchin, Horncastle, Hove, Huntingdon, Kenilworth, Keynsham, Kirkcaldy, Knutsford, Largs, Leighton Buzzard, Leominster, Lewes, Littlehampton, Lowestoft, Maldon, March, Montrose, Morpeth, Nailsea, Newark On Trent, Oakham, Ormskirk, Reigate, Ringwood, Romsey, Saffron Walden, Shirley (West Midlands), St Austell, Stirling, Stourbridge, Surbiton, Teddington, Tenby, Tenterden, Thame, Trowbridge, Uttoxeter, Wallasey, Wallingford, Walton On Thames, Wantage, Ware, Whitley Bay, Wisbech, Witham, Witney, Woodbridge
Location: PRIME PITCH/HIGH STREET, GOOD 2NDARY/FRINGE PRIME
Tenure: LEASE, PURCHASE
Use: RETAIL, CLASS A1
Notes: The company is looking for 1,500 to 3,000 sq ft (139 to 279 sq m) ground floor sales with 500 to 1,000 sq ft (46.5 to 93 sq m) ancillary space. Company website www.ewm.co.uk.
Initial Research Date: 20/10/1999 **Last Update Date:** 21/03/2006

Company Name: ETHEL AUSTIN LTD **Speciality:** CLOTHING
Requirements: 5 **Existing Outlets:** 290
Requirement Size: 2,500 - 5,000 sq ft **Use:** RETAIL
Outlets Required: Abergavenny, Abingdon, Acocks Green, Alfreton, Allestree, Alvaston, Ashbourne, Ashby De La Zouch, Bearwood, Beaumont Leys, Bedford, Beeston, Belper, Bicester, Birmingham, Blaby, Bloxwich, Boston, Brackley, Bromsgrove, Brownhills, Cannock, Cheltenham, Chipping Norton, Cirencester, Coalville, Coventry, Daventry, Didcot, Droitwich, Evesham, Gloucester, Grantham, Great Barr, Halesowen, Hanley, Harborne, Hucknall, Huntingdon, Kenilworth, Kidderminster, Kidsgrove, Kings Heath, Leamington Spa, Leek, Leicester, Leighton Buzzard, Lichfield, Long Eaton, Loughborough, Louth, Macclesfield, Mansfield, March, Market Harborough, Matlock, Melton Mowbray, Milton Keynes, Monmouth, Newark On Trent, Newport Pagnell, Northampton, Nottingham, Nuneaton, Oadby, Oakham, Oxford, Pershore, Peterborough, Redditch, Ripley, Rugby, Rushden, Sheffield, Sheldon, Shirley (West Midlands), Skegness, Sleaford, Smethwick, Solihull, Spalding, St Ives (Cambs), St Neots, Stamford, Stapleford, Stourport On Severn, Stow On The Wold, Stratford Upon Avon, Stroud, Sutton Coldfield, Sutton In Ashfield, Swindon, Tamworth, Tewkesbury, Uttoxeter, Walsall, Wantage, Warwick, Wellingborough, West Bridgford, Wigston, Wisbech, Witney, Wolverhampton, Worksop, Yardley, Yate
Amenities: Ancillary Storage Required
Location: PRIME PITCH/HIGH STREET, GOOD 2NDARY/FRINGE PRIME
Tenure: LEASE
Use: RETAIL, CLASS A1
Notes: The company is also interested in Birmingham city centre, Perry Bar (Birmingham), Claycross, Coventry city centre, Cannon Park (Coventry) Jubilee Crescent (Coventry), Leicester city centre, Malvern, Northampton city centre, Weston Favell (Northampton), Nottingham city centre, Mapperley and Crystal Peaks (Sheffield). Other locations in the Midlands may be considered where it doesn't already have representation.
Initial Research Date: 21/08/2003 **Last Update Date:** 13/03/2006

| | | | |
|-----------------|--|-----------------|---------------|
| Agent: | SALWAY BRADBURY | Tel: | 0121 707 4858 |
| | | Fax: | 0121 708 0506 |
| Address: | 58 Warwick Road Solihull B92 7JJ | Contact: | Mr Ken Salway |

| | | | |
|----------------------|---------------|--------------------|----------------------|
| Company Name: | FARMFOODS LTD | Speciality: | FOOD SUPERMARKETS |
|----------------------|---------------|--------------------|----------------------|

| | | | |
|----------------------|---|--------------------------|-----|
| Requirements: | 2 | Existing Outlets: | 300 |
|----------------------|---|--------------------------|-----|

| | | | |
|--------------------------|---------------------|-------------|--------|
| Requirement Size: | 5,000 - 8,000 sq ft | Use: | RETAIL |
|--------------------------|---------------------|-------------|--------|

Outlets Required: Aberystwyth, Acton, Aldershot, Alnwick, Altrincham, Ammanford, Andover, Ashington, Ashton In Makerfield, Ashton Under Lyne, Aylesbury, Bangor (Gwynedd), Bargoed, Barking, Barnet, Barnsley, Barnstaple, Barrow In Furness, Barry, Basingstoke, Bath, Beccles, Berwick Upon Tweed, Bexhill, Bexleyheath, Bicester, Billingham, Birmingham, Bishop Auckland, Bishop's Stortford, Blackheath, Blaydon, Blyth, Bodmin, Bognor Regis, Bootle, Borehamwood, Boscombe, Bournemouth, Bracknell, Bradford, Braintree, Brecon, Brentwood, Brighouse, Brighton, Bristol, Bromley, Bromsgrove, Brownhills, Burgess Hill, Bury, Bury St Edmunds, Buxton, Caerphilly, Camborne, Cambridge, Canterbury, Cardiff, Carlisle, Carmarthen, Castleford, Catford, Chatham, Cheadle, Chepstow, Chester Le Street, Chesterfield, Chichester, Chippenham, Chorlton Cum Hardy, Cirencester, Clacton On Sea, Cleveleys, Colchester, Colwyn Bay, Consett, Cramlington, Crawley, Crayford, Cricklewood, Cromer, Croydon, Cwmbran, Dagenham, Darlaston, Dartford, Darwen, Daventry, Deal, Diss, Dorchester, Downham Market, Droitwich, Droylsden, Dukinfield, Durham, Ealing, East Dereham, East Ham, Eastbourne, Eastleigh, Ebbw Vale, Edgware, Edmonton, Eltham, Ely, Enfield, Evesham, Exeter, Failsworth, Fakenham, Fareham, Farnborough, Felixstowe, Feltham, Fishguard, Fleetwood, Folkestone, Forest Hill, Gateshead, Gillingham, Glossop, Gloucester, Gosforth, Gosport, Great Malvern, Great Yarmouth, Greenford, Guildford, Halesowen, Halifax, Hanwell, Harlesden, Harlow, Harrogate, Harrow, Hartlepool, Harwich, Hastings, Hatfield, Havant, Haverfordwest, Haverhill, Hayes, Haywards Heath, Hemel Hempstead, Hendon, Herne Bay, Heswall, Hexham, Heywood, High Wycombe, Hitchin, Hoddesdon, Houghton Le Spring, Hounslow, Hove, Hucknall, Huntingdon, Jarrow, Kendal, Keynsham, Kidderminster, Kidsgrove, Kilburn, Kings Heath, Launceston, Leamington Spa, Leeds, Leicester, Leighton Buzzard, Leominster, Letchworth, Lewisham, Leytonstone, Lichfield, Littlehampton, Liverpool, Llandudno, Llanelli, Longton, Lowestoft, Macclesfield, Maesteg, Maidstone, Maldon, Manchester, March, Margate, Market Harborough, Melton Mowbray, Middleton, Midsomer Norton, Milford Haven, Monmouth, Morpeth, Nailsea, Neath, New Malden, Newbury, Newcastle Under Lyme, Newcastle Upon Tyne, Newmarket, Newport (Gwent), Newton Aycliffe, Newtown, North Shields, Northallerton, Northampton, Northwich, Oldbury, Oldham, Ormskirk, Orpington, Oxford, Palmers Green, Pembroke, Penarth, Penrith, Penzance, Plymouth, Pontypridd, Poole, Port Talbot, Porthcawl, Prestatyn, Radcliffe, Ramsgate, Reading, Redruth, Rhondda, Rhyl, Risca, Rochester, Romford, Royston, Rubery, Rugby, Ruislip, Rushden, Salisbury, Sandbach, Scarborough, Sheerness, Sheffield, Sheringham, Shirley (Surrey), Shrewsbury, Sittingbourne, Skegness, Sleaford, Slough, South Shields, Southall, Southampton, Southgate, Spalding, St Albans, St Austell, St Helens, St Neots, Staines, Stalybridge, Stamford, Stanley, Stanmore, Stoke On Trent, Stowmarket, Streatham, Stretford, Stroud, Sunderland, Surbiton, Swadlincote, Swanley, Swindon, Taunton, Telford, Tewkesbury, Thamesmead, Thirsk, Tonbridge, Tonypany, Torquay, Totton, Trowbridge, Truro, Uttoxeter, Uxbridge, Wallsend, Wanstead, Warminster, Waterloo, Watford, Wellingborough, Welshpool, Welwyn Garden City, Wembley, Whitby, Whitchurch (Shropshire), Whitchurch (South Glam), Whitehaven, Whitstable, Willenhall, Willesden, Winchester, Woking, Wood Green, Woolwich, Worcester, Workington, Worthing, Wrexham, Wymondham, Yeovil, Yiewsley, York

Amenities: Loading Area, Car Parking

Location: PRIME PITCH/HIGH STREET, IN-TOWN SHOPPING CENTRE, PROMINENT/BUSY MAIN ROAD, GOOD 2NDARY/FRINGE PRIME, OFF PITCH/TERTIARY, OUT-OF-TOWN SHOP. CENTRE, DEVMNT/GREEN FIELD SITE, FACTORY OUTLET CENTRES, EDGE OF TOWN, BROWN FIELD SITE, ESTABLISHED RETAIL PARK, N'BOURHOOD PARADES/ESTATES

Tenure: LEASE, PURCHASE

Use: RETAIL, CLASS A1, FOOD RETAIL WAREHOUSE

Notes: The company is looking for 5,000 to 8,000 sq ft retail space suitable for bulky frozen food shopping. Must have adjacent or nearby parking and HGV access. It will consider small retail parks, small shopping centres and roadside locations. It is interested in District Centres in Newcastle, Liverpool, Manchester, Bradford, Leeds, Sheffield, York, Birmingham, Stoke on Trent, Leicester, Cardiff, Reading, Southampton, Bournemouth and Bristol. Elsewhere it is also interested in Byker, Hetton le Hole in the North East; Alsager, Audenshaw, Cheadle Hulme, Hattersley and Wigton in the North West; Coseley and Tipton in the West Midlands; Llantrisant, Newbridge and Pembroke Dock in Wales; Attleborough in the East; Yeading in London and Westwood in the South East.

Initial Research Date: 10/02/2000

Last Update Date: 24/05/2006

Agent: PETER MARTIN & CO **Tel:** 01572 822 787
Fax: 01572 822 785
Address: 113 Main Street **Contact:** Mr Peter Martin
Lyddington
LE15 9LS

Company Name: PEACOCKS STORES LTD **Speciality:** DEPARTMENT STORES
Requirements: 4 **Existing Outlets:** 337
Requirement Size: 5,000 - 15,000 sq ft **Use:** RETAIL
Outlets Required: Abingdon, Aylesbury, Barkingside, Basildon, Beccles, Bermondsey, Bethnal Green, Billericay, Bow, Bury St Edmunds, Cambridge, Chelmsford, Chesham, Chingford, Corringham, Cricklewood, Cromer, Debden, Diss, East Dereham, Eastcote, Edgware, Fakenham, Felixstowe, Greenford, Hackney, Halstead, Hammersmith, Haringey, Harlow, Harold Hill, Harrow, Harwich, Hayes, Hertford, High Wycombe, Hitchin, Hunstanton, Kensal Green, Kentish Town, Kilburn, King's Lynn, Kingsbury, Leytonstone, Lowestoft, Maidenhead, March, Milton Keynes, Newport Pagnell, North Walsham, Oxford, Palmers Green, Poplar, Reading, Royston, Ruislip, Southall, St Albans, St Neots, Stoke Newington, Stowmarket, Sudbury, Swaffham, Swiss Cottage, Thame, Upminster, Uxbridge, Wantage, Watford, Wealdstone, Wembley, Willesden, Witney, Woodham Ferrers, Yiewsley
Location: PRIME PITCH/HIGH STREET, IN-TOWN SHOPPING CENTRE, GOOD 2NDARY/FRINGE PRIME, PROMINENT/BUSY MAIN ROAD
Tenure: LEASE
Use: RETAIL, CLASS A1
Notes: The company is also interested in Northampton suburbs, Oxford suburbs, Reading suburbs and South Woodham Ferrers. Other locations and extensions to existing stores will be considered.

Initial Research Date: 22/03/2000 **Last Update Date:** 08/06/2006
Agent: MASON & PARTNERS **Tel:** 0207 495 1971
Fax: 020 7495 2013
Address: 6-8 Maddox Street **Contact:** Mr Mike Smith
London
W1R 9PN

Company Name: PIZZAEXPRESS PLC **Speciality:** CAFE/RESTAURANT/
BAR
Requirements: 11 **Existing Outlets:** 300
Address: Pizza Express **Contact:** Mr MARC WARD
Union Park
1 Florence Way
Uxbridge
UB8 2LS
Email: marc.ward@pizzaexpress.com **Tel:** 01895 618 722
Requirement Size: 1,750 - 3,000 sq ft **Use:** RETAIL
Outlets Required: Andover, Arbroath, Ascot, Ashbourne, Baldock, Barnstaple, Basildon, Bath, Battle, Bearsden, Berwick Upon Tweed, Billericay, Birmingham, Boston, Bowness On Windermere, Bradford, Bradford On Avon, Brixton, Broadway, Burford, Burgess Hill, Bury, Carshalton, Chalfont St Peter, Cheam, Chertsey, Christchurch, Clapham, Croydon, Devizes, Doncaster, Douglas, Epping, Esher, Ewell, Falmouth, Fareham, Fleet, Gateshead, Glasgow, Glastonbury, Grantham, Haddington, Hastings, Havant, Headingley, Herne Hill, Hornchurch, Hornsey, Huddersfield, Hungerford, Ilfracombe, Ilkley, Kendal, Kensington, Kings Heath, Lewisham, Lichfield, Liverpool, Loughborough, Lymington, Maida Vale, Maldon, Malton, March, Margate, Melton Mowbray, Midhurst, Morningside, Nantwich, Newcastle Under Lyme, Newquay, Newton Abbot, Northallerton, Oban, Oxford, Peterborough, Richmond (Surrey), Rickmansworth, Ringwood, Ripon, Rugby, Shaftesbury, Sherborne, Skipton, Solihull, Southampton, Southfields, St Ives (Cornwall), St James's, St Neots, Stevenage, Stowmarket, Sudbury, Surbiton, Tetbury, Thame, Thirsk, Tollcross, Tooting, Waterloo (Greater London), Wells, Weymouth, Willesden, Wisbech, Witney, Wolverhampton, Woodstock, Wootton Bassett, Yarm

Amenities: Ancillary Storage Required, Ground Floor Only, Minimum Frontage 35 Ft+
Location: GOOD 2NDARY/FRINGE PRIME
Tenure: LEASE, PURCHASE
Use: RETAIL, CLASS A3
Notes: In London, the company is also interested in Clapham Common, Earlsfield, Edgware Road, Portobello, Queens Park, South Kensington and Willesden Green. Elsewhere, it is interested in Great Dunnlow, Prestbury, Salcombe, Glasgow's west end and Glasgow Victoria Street.

Initial Research Date: 14/01/2000 **Last Update Date:** 17/02/2006

Company Name: PRICELESS SHOES LTD **Speciality:** SHOE SHOPS

Requirement Size: 1,500 - 2,000 sq ft **Use:** RETAIL

Outlets Required: Bangor (Gwynedd), Bedford, Beeston, Birmingham, Bishop's Stortford, Boston, Bromsgrove, Cambridge, Chelmsley Wood, Chesterfield, Crewe, Diss, East Dereham, Felixstowe, Grantham, Great Yarmouth, Halesowen, Hanley, Hatfield, Haverhill, Hinckley, Huntingdon, Ilkeston, Ipswich, King's Lynn, Lichfield, Lincoln, Loughborough, Lowestoft, Maldon, Mansfield, March, Market Harborough, Melton Mowbray, Newark On Trent, Newmarket, Norwich, Nottingham, Oswestry, Peterborough, Retford, Rugby, Solihull, Spalding, St Ives (Cams), St Neots, Stamford, Stratford Upon Avon, Sudbury, Sutton Coldfield, Sutton In Ashfield, Tamworth, Telford, Thetford, Warwick, Wellingborough, Wickford, Worcester, Wrexham
Amenities: Ancillary Storage Required, Ground Floor Only

Location: PRIME PITCH/HIGH STREET, GOOD 2NDARY/FRINGE PRIME

Tenure: LEASE

Use: RETAIL, CLASS A1

Notes: The company wants a minimum of 18ft internal width and 750-1,000 sq ft. Other locations considered. Relocations: Birmingham, Hanley, Tamworth, Hinckley, Loughborough and Rugby. Drapers 25/10/2003: Stylo will open 30 more PriceLess stores next year after the value footwear chain proved to be the group's most successful fascia in spring 2003.

Initial Research Date: 16/10/2003 **Last Update Date:** 15/03/2006

Agent: CB RICHARD ELLIS **Tel:** 020 7663 5579
Fax:

Address: 80 New Bond Street
London
W1S 1SB **Contact:** Mr MIKE WIMBLE

APPENDIX 5

FLOORSPACE DATA (WISBECH TOWN CENTRE)

Appendix 5 Summary Floorspace Data for Wisbech Town Centre

| Retail Sector | Floorspace | |
|---|----------------|---------------|
| | sq ft | sq m |
| Convenience | 33,300 | 3,070 |
| Comparison | 178,300 | 16,590 |
| Services | 94,100 | 8,850 |
| Miscellaneous* | 6,800 | 630 |
| Vacant Units | 42,400 | 3,930 |
| Units with no Experian Goad Trade type** | 229,400 | 21,270 |
| Total Floorspace | 584,300 | 54,340 |

* For example: Post Offices, Information Bureaux

** For example: Public houses, offices, residential

Source: Experian Goad (April 2005)

Note: Experian does not publish corresponding floorspace data for the other Fenland study centres (March, Chatteris and Whittlesey)

Fenland District Council
FENLAND DISTRICT RETAIL STUDY

Annex 2: Retail and Leisure Capacity Spreadsheets



ROGER TYM & PARTNERS
Planners and Development Economists

August 2006

ROGER TYM & PARTNERS

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This document is formatted for double-sided printing.

SPREADSHEET CM1 - MARKET SHARES FOR COMPARISON SPENDING IN 2006

| | | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | TOTAL |
|---|--|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Population and Expenditure | | | | | | | | | | |
| Population 2006 | | 20,900 | 22,100 | 15,500 | 12,500 | 19,900 | 14,900 | 25,089 | 25,190 | 156,079 |
| Expenditure per capita in 2006 (in 2003 prices) £ | | 2,496 | 2,604 | 2,726 | 2,715 | 3,539 | 3,004 | 2,574 | 2,705 | |
| Total Expenditure 2006 £m | | 52.17 | 57.55 | 42.26 | 33.94 | 70.43 | 44.77 | 64.58 | 68.15 | 433.85 |

Pattern of Comparison Spending in 2006

Zone 1

| | | | | | | | | | | |
|--------------|---|-------|------|------|------|------|------|-------|-------|-------|
| Wisbech | 1 | 26.33 | 5.19 | 1.26 | 1.19 | 0.00 | 1.07 | 19.29 | 13.42 | 67.75 |
| Other zone 1 | 1 | 2.97 | 0.70 | 0.40 | 0.09 | 0.00 | 0.11 | 2.42 | 1.36 | 8.04 |

Zone 2

| | | | | | | | | | | |
|--------------|---|------|-------|------|------|------|------|------|------|-------|
| March | 2 | 0.04 | 17.49 | 1.86 | 2.22 | 0.48 | 2.86 | 1.29 | 0.58 | 26.84 |
| Other zone 2 | 2 | 0.07 | 1.55 | 0.41 | 0.31 | 0.00 | 0.03 | 0.00 | 0.22 | 2.58 |

Zone 3

| | | | | | | | | | | |
|------------|---|------|------|------|------|------|------|------|------|------|
| Whittlesey | 3 | 0.12 | 0.00 | 2.76 | 0.11 | 0.59 | 0.00 | 0.00 | 0.17 | 3.74 |
|------------|---|------|------|------|------|------|------|------|------|------|

Zone 4

| | | | | | | | | | | |
|-----------|---|------|------|------|------|------|------|------|------|------|
| Chatteris | 4 | 0.00 | 0.00 | 0.24 | 3.36 | 0.00 | 0.03 | 0.00 | 0.00 | 3.63 |
|-----------|---|------|------|------|------|------|------|------|------|------|

Zone 5

| | | | | | | | | | | |
|--------------|---|------|------|------|------|------|------|------|------|------|
| Ramsey | 5 | 0.00 | 0.00 | 0.00 | 0.00 | 6.26 | 0.00 | 0.00 | 0.00 | 6.26 |
| Other zone 5 | 5 | 0.00 | 0.00 | 0.00 | 0.00 | 0.07 | 0.00 | 0.00 | 0.00 | 0.07 |

Zone 6

| | | | | | | | | | | |
|---------------|---|------|------|------|------|------|------|------|------|------|
| Zone 6 stores | 6 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
|---------------|---|------|------|------|------|------|------|------|------|------|

Zone 7

| | | | | | | | | | | |
|---------------|---|------|------|------|------|------|------|------|------|------|
| Sutton Bridge | 7 | 0.13 | 0.00 | 0.00 | 0.00 | 0.15 | 0.00 | 0.70 | 0.58 | 1.56 |
|---------------|---|------|------|------|------|------|------|------|------|------|

Zone 8

| | | | | | | | | | | |
|---------------|---|------|------|------|------|------|------|------|------|------|
| Zone 8 stores | 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.58 | 1.91 | 2.49 |
|---------------|---|------|------|------|------|------|------|------|------|------|

Sub-Total for Catchment

| | | | | | | | | | | |
|--|--|--------------|--------------|-------------|-------------|-------------|-------------|--------------|--------------|---------------|
| | | 29.66 | 24.93 | 6.94 | 7.27 | 7.55 | 4.09 | 24.27 | 18.23 | 122.95 |
|--|--|--------------|--------------|-------------|-------------|-------------|-------------|--------------|--------------|---------------|

Outside Catchment

| | | | | | | | | | | |
|-------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|--------|
| Cambridge | 0 | 0.38 | 2.00 | 1.09 | 2.68 | 2.62 | 15.53 | 0.90 | 0.04 | 25.25 |
| Ely | 0 | 0.00 | 0.49 | 0.00 | 3.72 | 0.00 | 14.92 | 0.00 | 0.00 | 19.13 |
| Huntingdon | 0 | 0.00 | 0.59 | 0.55 | 2.97 | 13.93 | 0.07 | 0.00 | 0.04 | 18.14 |
| King's Lynn | 0 | 11.44 | 1.54 | 0.83 | 1.22 | 0.02 | 1.39 | 23.97 | 16.70 | 57.12 |
| Peterborough | 0 | 8.67 | 26.21 | 25.62 | 12.81 | 33.31 | 4.03 | 8.25 | 22.08 | 140.97 |
| Spalding | 0 | 0.10 | 0.13 | 0.12 | 0.00 | 0.00 | 0.00 | 0.45 | 5.82 | 6.61 |
| Other outside catchment | 0 | 1.92 | 1.66 | 7.11 | 3.27 | 13.00 | 4.73 | 6.74 | 5.24 | 43.69 |

Sub-Total Outside Catchment

| | | | | | | | | | | |
|--|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| | | 22.51 | 32.62 | 35.32 | 26.67 | 62.88 | 40.67 | 40.31 | 49.92 | 310.90 |
|--|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|

TOTAL

| | | | | | | | | | | |
|--|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| | | 52.17 | 57.55 | 42.26 | 33.94 | 70.43 | 44.77 | 64.58 | 68.15 | 433.85 |
|--|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|

SPREADSHEET CM2 - MARKET SHARES FOR COMPARISON SPENDING IN 2011

| | | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | TOTAL |
|---|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Population and Expenditure | | | | | | | | | | |
| Population 2011 | | 21,700 | 23,800 | 15,700 | 13,500 | 19,800 | 16,000 | 26,357 | 26,728 | 163,585 |
| Expenditure per capita in 2011 (in 2003 prices) £ | | 2,908 | 3,034 | 3,176 | 3,163 | 4,123 | 3,500 | 2,999 | 3,152 | |
| Total Expenditure 2011 £m | | 63.11 | 72.21 | 49.87 | 42.71 | 81.64 | 56.00 | 79.04 | 84.24 | 528.82 |
| Pattern of Comparison Spending in 2011 | | | | | | | | | | |
| Zone 1 | | | | | | | | | | |
| Wisbech | 1 | 31.85 | 6.51 | 1.49 | 1.49 | 0.00 | 1.34 | 23.61 | 16.59 | 82.89 |
| Other zone 1 | 1 | 3.60 | 0.88 | 0.47 | 0.11 | 0.00 | 0.13 | 2.96 | 1.68 | 9.82 |
| Zone 2 | | | | | | | | | | |
| March | 2 | 0.05 | 21.95 | 2.20 | 2.80 | 0.56 | 3.58 | 1.58 | 0.71 | 33.44 |
| Other zone 2 | 2 | 0.08 | 1.94 | 0.48 | 0.39 | 0.00 | 0.03 | 0.00 | 0.27 | 3.19 |
| Zone 3 | | | | | | | | | | |
| Whittlesey | 3 | 0.14 | 0.00 | 3.26 | 0.13 | 0.68 | 0.00 | 0.00 | 0.21 | 4.42 |
| Zone 4 | | | | | | | | | | |
| Chatteris | 4 | 0.00 | 0.00 | 0.29 | 4.22 | 0.00 | 0.03 | 0.00 | 0.00 | 4.55 |
| Zone 5 | | | | | | | | | | |
| Ramsey | 5 | 0.00 | 0.00 | 0.00 | 0.00 | 7.26 | 0.00 | 0.00 | 0.00 | 7.26 |
| Other zone 5 | 5 | 0.00 | 0.00 | 0.00 | 0.00 | 0.08 | 0.00 | 0.00 | 0.00 | 0.08 |
| Zone 6 | | | | | | | | | | |
| Zone 6 stores | 6 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Zone 7 | | | | | | | | | | |
| Sutton Bridge | 7 | 0.16 | 0.00 | 0.00 | 0.00 | 0.17 | 0.00 | 0.85 | 0.71 | 1.90 |
| Zone 8 | | | | | | | | | | |
| Zone 8 stores | 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.71 | 2.36 | 3.07 |
| Sub-Total for Catchment | | 35.88 | 31.28 | 8.19 | 9.15 | 8.75 | 5.12 | 29.71 | 22.53 | 150.61 |
| Outside Catchment | | | | | | | | | | |
| Cambridge | 0 | 0.46 | 2.51 | 1.29 | 3.37 | 3.03 | 19.43 | 1.11 | 0.05 | 31.25 |
| Ely | 0 | 0.00 | 0.61 | 0.00 | 4.68 | 0.00 | 18.66 | 0.00 | 0.00 | 23.96 |
| Huntingdon | 0 | 0.00 | 0.74 | 0.65 | 3.73 | 16.14 | 0.09 | 0.00 | 0.05 | 21.40 |
| King's Lynn | 0 | 13.84 | 1.94 | 0.98 | 1.53 | 0.03 | 1.74 | 29.33 | 20.64 | 70.04 |
| Peterborough | 0 | 10.49 | 32.88 | 30.23 | 16.11 | 38.61 | 5.04 | 10.10 | 27.30 | 170.76 |
| Spalding | 0 | 0.12 | 0.17 | 0.14 | 0.00 | 0.00 | 0.00 | 0.54 | 7.19 | 8.16 |
| Other outside catchment | 0 | 2.32 | 2.08 | 8.39 | 4.12 | 15.07 | 5.92 | 8.25 | 6.48 | 52.64 |
| Sub-Total Outside Catchment | | 27.23 | 40.93 | 41.68 | 33.55 | 72.89 | 50.88 | 49.33 | 61.71 | 378.21 |
| TOTAL | | 63.11 | 72.21 | 49.87 | 42.71 | 81.64 | 56.00 | 79.04 | 84.24 | 528.82 |

SPREADSHEET CM3 - MARKET SHARES FOR COMPARISON SPENDING IN 2016

| | | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | TOTAL |
|---|--|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Population and Expenditure | | | | | | | | | | |
| Population 2016 | | 23,300 | 25,100 | 16,000 | 14,200 | 19,800 | 16,900 | 27,543 | 27,893 | 170,736 |
| Expenditure per capita in 2016 (in 2003 prices) £ | | 3,551 | 3,704 | 3,878 | 3,862 | 5,034 | 4,274 | 3,662 | 3,848 | |
| Total Expenditure 2016 £m | | 82.74 | 92.98 | 62.05 | 54.85 | 99.68 | 72.23 | 100.85 | 107.34 | 672.71 |

Pattern of Comparison Spending in 2011

Zone 1

| | | | | | | | | | | |
|--------------|---|-------|------|------|------|------|------|-------|-------|--------|
| Wisbech | 1 | 41.76 | 8.38 | 1.86 | 1.92 | 0.00 | 1.73 | 30.12 | 21.14 | 106.90 |
| Other zone 1 | 1 | 4.72 | 1.13 | 0.58 | 0.14 | 0.00 | 0.17 | 3.77 | 2.14 | 12.65 |

Zone 2

| | | | | | | | | | | |
|--------------|---|------|-------|------|------|------|------|------|------|-------|
| March | 2 | 0.07 | 28.26 | 2.74 | 3.59 | 0.69 | 4.62 | 2.02 | 0.91 | 42.89 |
| Other zone 2 | 2 | 0.10 | 2.50 | 0.60 | 0.50 | 0.00 | 0.04 | 0.00 | 0.34 | 4.09 |

Zone 3

| | | | | | | | | | | |
|------------|---|------|------|------|------|------|------|------|------|------|
| Whittlesey | 3 | 0.19 | 0.00 | 4.05 | 0.17 | 0.84 | 0.00 | 0.00 | 0.26 | 5.51 |
|------------|---|------|------|------|------|------|------|------|------|------|

Zone 4

| | | | | | | | | | | |
|-----------|---|------|------|------|------|------|------|------|------|------|
| Chatteris | 4 | 0.00 | 0.00 | 0.36 | 5.42 | 0.00 | 0.04 | 0.00 | 0.00 | 5.83 |
|-----------|---|------|------|------|------|------|------|------|------|------|

Zone 5

| | | | | | | | | | | |
|--------------|---|------|------|------|------|------|------|------|------|------|
| Ramsey | 5 | 0.00 | 0.00 | 0.00 | 0.00 | 8.86 | 0.00 | 0.00 | 0.00 | 8.86 |
| Other zone 5 | 5 | 0.00 | 0.00 | 0.00 | 0.00 | 0.09 | 0.00 | 0.00 | 0.00 | 0.09 |

Zone 6

| | | | | | | | | | | |
|---------------|---|------|------|------|------|------|------|------|------|------|
| Zone 6 stores | 6 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
|---------------|---|------|------|------|------|------|------|------|------|------|

Zone 7

| | | | | | | | | | | |
|---------------|---|------|------|------|------|------|------|------|------|------|
| Sutton Bridge | 7 | 0.21 | 0.00 | 0.00 | 0.00 | 0.21 | 0.00 | 1.09 | 0.91 | 2.42 |
|---------------|---|------|------|------|------|------|------|------|------|------|

Zone 8

| | | | | | | | | | | |
|---------------|---|------|------|------|------|------|------|------|------|------|
| Zone 8 stores | 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.90 | 3.01 | 3.91 |
|---------------|---|------|------|------|------|------|------|------|------|------|

Sub-Total for Catchment

| | | | | | | | | | | |
|--|--|--------------|--------------|--------------|--------------|--------------|-------------|--------------|--------------|---------------|
| | | 47.04 | 40.27 | 10.18 | 11.76 | 10.69 | 6.60 | 37.90 | 28.71 | 193.16 |
|--|--|--------------|--------------|--------------|--------------|--------------|-------------|--------------|--------------|---------------|

Outside Catchment

| | | | | | | | | | | |
|-------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|--------|
| Cambridge | 0 | 0.60 | 3.23 | 1.61 | 4.33 | 3.70 | 25.06 | 1.41 | 0.06 | 40.01 |
| Ely | 0 | 0.00 | 0.79 | 0.00 | 6.02 | 0.00 | 24.07 | 0.00 | 0.00 | 30.87 |
| Huntingdon | 0 | 0.00 | 0.95 | 0.81 | 4.79 | 19.71 | 0.11 | 0.00 | 0.06 | 26.44 |
| King's Lynn | 0 | 18.15 | 2.49 | 1.22 | 1.97 | 0.03 | 2.25 | 37.43 | 26.30 | 89.84 |
| Peterborough | 0 | 13.75 | 42.34 | 37.61 | 20.69 | 47.14 | 6.50 | 12.88 | 34.78 | 215.71 |
| Spalding | 0 | 0.15 | 0.21 | 0.17 | 0.00 | 0.00 | 0.00 | 0.70 | 9.16 | 10.40 |
| Other outside catchment | 0 | 3.04 | 2.68 | 10.44 | 5.29 | 18.40 | 7.64 | 10.53 | 8.25 | 66.28 |

Sub-Total Outside Catchment

| | | | | | | | | | | |
|--|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| | | 35.70 | 52.70 | 51.87 | 43.09 | 88.99 | 65.62 | 62.95 | 78.63 | 479.55 |
|--|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|

TOTAL

| | | | | | | | | | | |
|--|--|--------------|--------------|--------------|--------------|--------------|--------------|---------------|---------------|---------------|
| | | 82.74 | 92.98 | 62.05 | 54.85 | 99.68 | 72.23 | 100.85 | 107.34 | 672.71 |
|--|--|--------------|--------------|--------------|--------------|--------------|--------------|---------------|---------------|---------------|

SPREADSHEET CM4 - MARKET SHARES FOR COMPARISON SPENDING IN 2021

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | TOTAL |
|---|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Population and Expenditure | | | | | | | | | |
| Population 2021 | 25,100 | 26,600 | 16,400 | 14,800 | 19,800 | 17,800 | 28,750 | 29,080 | 178,330 |
| Expenditure per capita in 2021 (in 2003 prices) £ | 4,383 | 4,572 | 4,787 | 4,767 | 6,214 | 5,275 | 4,519 | 4,750 | |
| Total Expenditure 2021 £m | 110.01 | 121.62 | 78.51 | 70.56 | 123.04 | 93.90 | 129.94 | 138.12 | 865.69 |

Pattern of Comparison Spending in 2011

Zone 1

| | | | | | | | | | | |
|--------------|---|-------|-------|------|------|------|------|-------|-------|--------|
| Wisbech | 1 | 55.52 | 10.96 | 2.35 | 2.47 | 0.00 | 2.24 | 38.81 | 27.21 | 139.56 |
| Other zone 1 | 1 | 6.27 | 1.48 | 0.74 | 0.18 | 0.00 | 0.22 | 4.86 | 2.75 | 16.51 |

Zone 2

| | | | | | | | | | | |
|--------------|---|------|-------|------|------|------|------|------|------|-------|
| March | 2 | 0.09 | 36.97 | 3.46 | 4.62 | 0.85 | 6.01 | 2.60 | 1.17 | 55.77 |
| Other zone 2 | 2 | 0.14 | 3.27 | 0.76 | 0.65 | 0.00 | 0.06 | 0.00 | 0.44 | 5.31 |

Zone 3

| | | | | | | | | | | |
|------------|---|------|------|------|------|------|------|------|------|------|
| Whittlesey | 3 | 0.25 | 0.00 | 5.12 | 0.22 | 1.03 | 0.00 | 0.00 | 0.34 | 6.97 |
|------------|---|------|------|------|------|------|------|------|------|------|

Zone 4

| | | | | | | | | | | |
|-----------|---|------|------|------|------|------|------|------|------|------|
| Chatteris | 4 | 0.00 | 0.00 | 0.46 | 6.98 | 0.00 | 0.06 | 0.00 | 0.00 | 7.49 |
|-----------|---|------|------|------|------|------|------|------|------|------|

Zone 5

| | | | | | | | | | | |
|--------------|---|------|------|------|------|-------|------|------|------|-------|
| Ramsey | 5 | 0.00 | 0.00 | 0.00 | 0.00 | 10.94 | 0.00 | 0.00 | 0.00 | 10.94 |
| Other zone 5 | 5 | 0.00 | 0.00 | 0.00 | 0.00 | 0.11 | 0.00 | 0.00 | 0.00 | 0.11 |

Zone 6

| | | | | | | | | | | |
|---------------|---|------|------|------|------|------|------|------|------|------|
| Zone 6 stores | 6 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
|---------------|---|------|------|------|------|------|------|------|------|------|

Zone 7

| | | | | | | | | | | |
|---------------|---|------|------|------|------|------|------|------|------|------|
| Sutton Bridge | 7 | 0.28 | 0.00 | 0.00 | 0.00 | 0.26 | 0.00 | 1.40 | 1.17 | 3.11 |
|---------------|---|------|------|------|------|------|------|------|------|------|

Zone 8

| | | | | | | | | | | |
|---------------|---|------|------|------|------|------|------|------|------|------|
| Zone 8 stores | 8 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.16 | 3.87 | 5.04 |
|---------------|---|------|------|------|------|------|------|------|------|------|

Sub-Total for Catchment

| | | | | | | | | | | |
|--|--|--------------|--------------|--------------|--------------|--------------|-------------|--------------|--------------|---------------|
| | | 62.55 | 52.68 | 12.89 | 15.12 | 13.19 | 8.58 | 48.84 | 36.95 | 250.79 |
|--|--|--------------|--------------|--------------|--------------|--------------|-------------|--------------|--------------|---------------|

Outside Catchment

| | | | | | | | | | | |
|-------------------------|---|-------|-------|-------|-------|-------|-------|-------|-------|--------|
| Cambridge | 0 | 0.80 | 4.22 | 2.03 | 5.57 | 4.57 | 32.58 | 1.82 | 0.08 | 51.68 |
| Ely | 0 | 0.00 | 1.03 | 0.00 | 7.74 | 0.00 | 31.29 | 0.00 | 0.00 | 40.06 |
| Huntingdon | 0 | 0.00 | 1.24 | 1.02 | 6.17 | 24.33 | 0.15 | 0.00 | 0.08 | 32.99 |
| King's Lynn | 0 | 24.13 | 3.26 | 1.55 | 2.53 | 0.04 | 2.92 | 48.22 | 33.84 | 116.49 |
| Peterborough | 0 | 18.28 | 55.39 | 47.59 | 26.62 | 58.19 | 8.45 | 16.60 | 44.76 | 275.87 |
| Spalding | 0 | 0.20 | 0.28 | 0.22 | 0.00 | 0.00 | 0.00 | 0.90 | 11.79 | 13.39 |
| Other outside catchment | 0 | 4.04 | 3.51 | 13.21 | 6.81 | 22.72 | 9.93 | 13.57 | 10.62 | 84.40 |

Sub-Total Outside Catchment

| | | | | | | | | | | |
|--|--|--------------|--------------|--------------|--------------|---------------|--------------|--------------|---------------|---------------|
| | | 47.46 | 68.94 | 65.62 | 55.44 | 109.85 | 85.31 | 81.10 | 101.18 | 614.89 |
|--|--|--------------|--------------|--------------|--------------|---------------|--------------|--------------|---------------|---------------|

TOTAL

| | | | | | | | | | | |
|--|--|---------------|---------------|--------------|--------------|---------------|--------------|---------------|---------------|---------------|
| | | 110.01 | 121.62 | 78.51 | 70.56 | 123.04 | 93.90 | 129.94 | 138.12 | 865.69 |
|--|--|---------------|---------------|--------------|--------------|---------------|--------------|---------------|---------------|---------------|

**Spreadsheet CM5 - Summary of Capacity, Comparison Goods Base
Scenario A (Decreasing Retention)**

| | 2006 | 2011 | 2016 | 2021 | Change 2006-11 | Change 2011-16 | Change 2016-2021 | Change 2006-2021 |
|--|-------------|-------------|-------------|-------------|---------------------------|---------------------------|-----------------------------|-----------------------------|
| Total Population | 156,079 | 163,585 | 170,736 | 178,330 | 7,506 | 7,152 | 7,593 | 22,251 |
| Total Expenditure £m | 433.9 | 528.8 | 672.7 | 865.7 | 95.0 | 143.9 | 193.0 | 431.8 |
| Retained Expenditure £m | 122.9 | 142.8 | 174.9 | 216.4 | 19.8 | 32.1 | 41.5 | 93.5 |
| Retained Expenditure % | 28 | 27 | 26 | 25 | | | | |
| Leakage £m | 310.9 | 386.0 | 497.8 | 649.3 | 75.1 | 111.8 | 151.5 | 338.4 |
| Inflow £m | | | | | 0.0 | 0.0 | 0.0 | 0.0 |
| Total Turnover of Convenience Stores in OCA £m | 122.9 | 142.8 | 174.9 | 216.4 | 19.8 | 32.1 | 41.5 | 93.5 |
| Initial Surplus £m/annum (Growth in Retained Expenditure) | | | | | 19.8 | 32.1 | 41.5 | 93.5 |
| Claims on Expenditure | | | | | | | | |
| Existing Traders | 0 | 12.8 | 26.9 | 42.5 | 12.8 | 14.1 | 15.6 | 42.5 |
| Commitments | 0 | 10.1 | 11.1 | 12.3 | 10.1 | 1.0 | 1.2 | 12.3 |
| Impact on capacity £m | 0 | 22.9 | 38.0 | 54.8 | 22.9 | 15.2 | 16.8 | 54.8 |
| SUMMARY | | | | | 2006-2011 | 2011-2016 | 2016-2021 | 2006-2021 |
| Initial surplus £m | | | | | 19.8 | 32.1 | 41.5 | 93.5 |
| Claims on capacity £m | | | | | 22.9 | 15.2 | 16.8 | 54.8 |
| RESIDUAL £m | | | | | -3.0 | 16.9 | 24.8 | 38.7 |
| Turnover per sq.m | | | | | 4,168 | 4,601 | 5,080 | |
| Net Floorspace Requirement sq.m | | | | | -728 | 3,683 | 4,874 | 7,829 |
| Gross Floorspace Requirement sq.m | | | | | -1,039 | 5,261 | 6,963 | 11,184 |

**Spreadsheet CM6 - Summary of Capacity, Comparison Goods Base
Scenario B (Constant Retention)**

| | 2006 | 2011 | 2016 | 2021 | Change 2006-11 | Change 2011-16 | Change 2016-2021 | Change 2006-2021 |
|--|-------------|-------------|-------------|-------------|---------------------------|---------------------------|-----------------------------|-----------------------------|
| Total Population | 156,079 | 163,585 | 170,736 | 178,330 | 7,506 | 7,152 | 7,593 | 22,251 |
| Total Expenditure £m | 433.9 | 528.8 | 672.7 | 865.7 | 95.0 | 143.9 | 193.0 | 431.8 |
| Retained Expenditure £m | 122.9 | 149.9 | 190.6 | 245.3 | 26.9 | 40.8 | 54.7 | 122.4 |
| Retained Expenditure % | 28 | 28 | 28 | 28 | | | | |
| Leakage £m | 310.9 | 379.0 | 482.1 | 620.4 | 68.1 | 103.1 | 138.3 | 309.5 |
| Inflow £m | | | | | 0.0 | 0.0 | 0.0 | 0.0 |
| Total Turnover of Convenience Stores in OCA £m | 122.9 | 149.9 | 190.6 | 245.3 | 26.9 | 40.8 | 54.7 | 122.4 |
| Initial Surplus £m/annum (Growth in Retained Expenditure) | | | | | 26.9 | 40.8 | 54.7 | 122.4 |
| Claims on Expenditure | | | | | | | | |
| Existing Traders | 0 | 12.8 | 26.9 | 42.5 | 12.8 | 14.1 | 15.6 | 42.5 |
| Commitments | 0 | 10.1 | 11.1 | 12.3 | 10.1 | 1.0 | 1.2 | 12.3 |
| Impact on capacity £m | 0 | 22.9 | 38.0 | 54.8 | 22.9 | 15.2 | 16.8 | 54.8 |
| SUMMARY | | | | | 2006-2011 | 2011-2016 | 2016-2021 | 2006-2021 |
| Initial surplus £m | | | | | 26.9 | 40.8 | 54.7 | 122.4 |
| Claims on capacity £m | | | | | 22.9 | 15.2 | 16.8 | 54.8 |
| RESIDUAL £m | | | | | 4.0 | 25.6 | 37.9 | 67.6 |
| Turnover per sq.m | | | | | 4,168 | 4,601 | 5,080 | |
| Net Floorspace Requirement sq.m | | | | | 971 | 5,563 | 7,466 | 14,001 |
| Gross Floorspace Requirement sq.m | | | | | 1,388 | 7,948 | 10,666 | 20,001 |

**Spreadsheet CM7 - Summary of Capacity, Comparison Goods Base
Scenario C (Moderately Increasing Retention)**

| | 2006 | 2011 | 2016 | 2021 | Change 2006-11 | Change 2011-16 | Change 2016-2021 | Change 2006-2021 |
|--|-------------|-------------|-------------|-------------|---------------------------|---------------------------|-----------------------------|-----------------------------|
| Total Population | 156,079 | 163,585 | 170,736 | 178,330 | 7,506 | 7,152 | 7,593 | 22,251 |
| Total Expenditure £m | 433.9 | 528.8 | 672.7 | 865.7 | 95.0 | 143.9 | 193.0 | 431.8 |
| Retained Expenditure £m | 122.9 | 153.4 | 201.8 | 268.4 | 30.4 | 48.5 | 66.6 | 145.4 |
| Retained Expenditure % | 28 | 29 | 30 | 31 | | | | |
| Leakage £m | 310.9 | 375.5 | 470.9 | 597.3 | 64.6 | 95.4 | 126.4 | 286.4 |
| Inflow £m | | | | | 0.0 | 0.0 | 0.0 | 0.0 |
| Total Turnover of Convenience Stores in OCA £m | 122.9 | 153.4 | 201.8 | 268.4 | 30.4 | 48.5 | 66.6 | 145.4 |
| Initial Surplus £m/annum (Growth in Retained Expenditure) | | | | | 30.4 | 48.5 | 66.6 | 145.4 |
| Claims on Expenditure | | | | | | | | |
| Existing Traders | 0 | 12.8 | 26.9 | 42.5 | 12.8 | 14.1 | 15.6 | 42.5 |
| Commitments | 0 | 10.1 | 11.1 | 12.3 | 10.1 | 1.0 | 1.2 | 12.3 |
| Impact on capacity £m | 0 | 22.9 | 38.0 | 54.8 | 22.9 | 15.2 | 16.8 | 54.8 |
| SUMMARY | | | | | 2006-2011 | 2011-2016 | 2016-2021 | 2006-2021 |
| Initial surplus £m | | | | | 30.4 | 48.5 | 66.6 | 145.4 |
| Claims on capacity £m | | | | | 22.9 | 15.2 | 16.8 | 54.8 |
| RESIDUAL £m | | | | | 7.5 | 33.3 | 49.8 | 90.6 |
| Turnover per sq.m | | | | | 4,168 | 4,601 | 5,080 | |
| Net Floorspace Requirement sq.m | | | | | 1,810 | 7,232 | 9,801 | 18,843 |
| Gross Floorspace Requirement sq.m | | | | | 2,586 | 10,331 | 14,002 | 26,919 |

**Spreadsheet CM8 - Summary of Capacity, Comparison Goods Base
Scenario D (Significantly Increasing Retention)**

| | 2006 | 2011 | 2016 | 2021 | Change 2006-11 | Change 2011-16 | Change 2016-2021 | Change 2006-2021 |
|--|-------------|-------------|-------------|-------------|---------------------------|---------------------------|-----------------------------|-----------------------------|
| Total Population | 156,079 | 163,585 | 170,736 | 178,330 | 7,506 | 7,152 | 7,593 | 22,251 |
| Total Expenditure £m | 433.9 | 528.8 | 672.7 | 865.7 | 95.0 | 143.9 | 193.0 | 431.8 |
| Retained Expenditure £m | 122.9 | 158.6 | 215.3 | 294.3 | 35.7 | 56.6 | 79.1 | 171.4 |
| Retained Expenditure % | 28 | 30 | 32 | 34 | | | | |
| Leakage £m | 310.9 | 370.2 | 457.4 | 571.4 | 59.3 | 87.3 | 113.9 | 260.4 |
| Inflow £m | | | | | 0.0 | 0.0 | 0.0 | 0.0 |
| Total Turnover of Convenience Stores in OCA £m | 122.9 | 158.6 | 215.3 | 294.3 | 35.7 | 56.6 | 79.1 | 171.4 |
| Initial Surplus £m/annum (Growth in Retained Expenditure) | | | | | 35.7 | 56.6 | 79.1 | 171.4 |
| Claims on Expenditure | | | | | | | | |
| Existing Traders | 0 | 12.8 | 26.9 | 42.5 | 12.8 | 14.1 | 15.6 | 42.5 |
| Commitments | 0 | 10.1 | 11.1 | 12.3 | 10.1 | 1.0 | 1.2 | 12.3 |
| Impact on capacity £m | 0 | 22.9 | 38.0 | 54.8 | 22.9 | 15.2 | 16.8 | 54.8 |
| SUMMARY | | | | | 2006-2011 | 2011-2016 | 2016-2021 | 2006-2021 |
| Initial surplus £m | | | | | 35.7 | 56.6 | 79.1 | 171.4 |
| Claims on capacity £m | | | | | 22.9 | 15.2 | 16.8 | 54.8 |
| RESIDUAL £m | | | | | 12.8 | 41.4 | 62.3 | 116.6 |
| Turnover per sq.m | | | | | 4,168 | 4,601 | 5,080 | |
| Net Floorspace Requirement sq.m | | | | | 3,079 | 9,007 | 12,265 | 24,351 |
| Gross Floorspace Requirement sq.m | | | | | 4,399 | 12,867 | 17,521 | 34,786 |

SPREADSHEET CV1 - MARKET SHARES FOR CONVENIENCE SPENDING IN 2006

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | TOTAL |
|---|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Population and Expenditure | | | | | | | | | |
| Population 2006 | 20,900 | 22,100 | 15,500 | 12,500 | 19,900 | 14,900 | 25,089 | 25,190 | 156,079 |
| Expenditure per capita in 2006 (in 2003 prices) £ | 1,398 | 1,436 | 1,460 | 1,462 | 1,747 | 1,544 | 1,425 | 1,502 | |
| Total Expenditure 2006 £m | 29.21 | 31.74 | 22.62 | 18.27 | 34.77 | 23.00 | 35.75 | 37.84 | 233.21 |

Pattern of Convenience Spending in 2006

Zone 1

| | | | | | | | | | | |
|---|---|-------|------|------|------|------|------|-------|------|-------|
| Asda, North End, Wisbech | 1 | 5.97 | 0.55 | 0.13 | 0.49 | 0.00 | 0.17 | 5.91 | 5.98 | 19.20 |
| Somerfield, Horse Fair, Wisbech | 1 | 6.23 | 0.00 | 0.64 | 0.00 | 0.00 | 0.00 | 0.76 | 0.45 | 8.08 |
| Tesco Superstore, Sandown Road, Wisbech | 1 | 12.26 | 0.19 | 0.20 | 0.00 | 0.00 | 0.17 | 10.37 | 6.10 | 29.29 |
| Other Wisbech | 1 | 2.98 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.17 | 1.08 | 6.23 |

Zone 2

| | | | | | | | | | | |
|--|---|------|-------|------|------|------|------|------|------|-------|
| Sainsburys, Mill View, March | 2 | 0.00 | 10.77 | 0.39 | 0.78 | 0.27 | 0.63 | 0.42 | 0.00 | 13.26 |
| Somerfield, High Street, March | 2 | 0.00 | 2.53 | 0.00 | 0.00 | 0.00 | 0.00 | 0.19 | 0.00 | 2.72 |
| Tesco Superstore, March Industrial Estate, March | 2 | 0.09 | 14.13 | 2.46 | 3.36 | 0.09 | 2.88 | 0.41 | 0.33 | 23.75 |
| Other March | 2 | 0.00 | 2.27 | 0.07 | 0.35 | 0.00 | 0.62 | 0.00 | 0.00 | 3.31 |

Zone 3

| | | | | | | | | | | |
|---------------------------------------|---|------|------|------|------|------|------|------|------|------|
| Somerfield, Blunts Lane, Peterborough | 3 | 0.00 | 0.00 | 6.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.13 | 6.13 |
| Other zone 3 | 3 | 0.00 | 0.00 | 0.63 | 0.00 | 0.00 | 0.17 | 0.00 | 0.00 | 0.80 |

Zone 4

| | | | | | | | | | | |
|--|---|------|------|------|------|------|------|------|------|------|
| Co-Op, Market Town Store, Bridge Street, Chatteris | 4 | 0.00 | 0.00 | 0.20 | 2.98 | 0.18 | 0.17 | 0.00 | 0.00 | 3.53 |
| Somerfield, High Street, Chatteris | 4 | 0.00 | 0.00 | 0.00 | 5.50 | 0.00 | 0.00 | 0.00 | 0.00 | 5.50 |
| Other Chatteris | 4 | 0.00 | 0.00 | 0.00 | 0.94 | 0.00 | 0.00 | 0.00 | 0.00 | 0.94 |

Zone 5

| | | | | | | | | | | |
|--|---|------|------|------|------|------|------|------|------|-------|
| Co-Op, Rainbow Store, Newtown Road, Huntingdon | 5 | 0.17 | 0.00 | 0.07 | 0.00 | 9.54 | 0.00 | 0.00 | 0.44 | 10.21 |
| Somerfield, Great Whyte, Huntingdon | 5 | 0.00 | 0.00 | 0.07 | 0.00 | 4.99 | 0.00 | 0.00 | 0.00 | 5.05 |
| Other zone 5 | 5 | 0.00 | 0.00 | 0.00 | 0.00 | 1.54 | 0.00 | 0.00 | 0.00 | 1.54 |

Zone 6

| | | | | | | | | | | |
|---------------|---|------|------|------|------|------|------|------|------|------|
| Zone 6 stores | 6 | 0.00 | 0.00 | 0.07 | 0.00 | 0.00 | 1.47 | 0.00 | 0.00 | 1.54 |
|---------------|---|------|------|------|------|------|------|------|------|------|

Zone 7

| | | | | | | | | | | |
|---------------|---|------|------|------|------|------|------|------|------|------|
| Zone 7 stores | 7 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.48 | 0.00 | 1.48 |
|---------------|---|------|------|------|------|------|------|------|------|------|

Zone 8

| | | | | | | | | | | |
|---------------|---|------|------|------|------|------|------|------|------|------|
| Zone 8 stores | 8 | 0.00 | 0.00 | 0.14 | 0.00 | 0.00 | 0.00 | 0.00 | 2.22 | 2.36 |
|---------------|---|------|------|------|------|------|------|------|------|------|

Sub-Total for Catchment

| | | | | | | | | | | |
|--|--|--------------|--------------|--------------|--------------|--------------|-------------|--------------|--------------|---------------|
| | | 27.70 | 30.43 | 11.07 | 14.40 | 16.61 | 6.29 | 21.71 | 16.72 | 144.93 |
|--|--|--------------|--------------|--------------|--------------|--------------|-------------|--------------|--------------|---------------|

Outside Catchment

| | | | | | | | | | | |
|--|---|------|------|------|------|------|------|------|------|-------|
| Asda, Viersen Platz, Peterborough | 0 | 0.00 | 0.00 | 1.26 | 0.00 | 0.75 | 0.00 | 0.00 | 0.44 | 2.44 |
| Co-Op, Food Shop, West Street, Spalding | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.37 | 7.02 | 8.39 |
| Kwik Save, High Causeway, Peterborough | 0 | 0.00 | 0.00 | 1.31 | 0.00 | 0.18 | 0.00 | 0.00 | 0.00 | 1.49 |
| Morrisons, Wardentree Lane, Spalding | 0 | 0.17 | 0.00 | 0.00 | 0.00 | 0.18 | 0.00 | 0.41 | 2.19 | 2.96 |
| Sainsburys, Oxney Road, Peterborough | 0 | 0.17 | 0.00 | 1.34 | 0.00 | 0.00 | 0.00 | 0.00 | 2.57 | 4.08 |
| Tesco Express, Wertheim Way, Huntingdon | 0 | 0.00 | 0.00 | 0.07 | 0.54 | 2.37 | 0.11 | 0.31 | 0.00 | 3.40 |
| Tesco Extra, The Serpentine, Peterborough | 0 | 0.00 | 0.19 | 4.77 | 0.13 | 1.61 | 0.00 | 0.00 | 1.01 | 7.71 |
| Tesco Superstore, Abbots Ripton Road, Huntingdon | 0 | 0.00 | 0.00 | 0.25 | 0.69 | 6.52 | 0.00 | 0.00 | 0.00 | 7.45 |
| Tesco Superstore, Angel Drove, Ely | 0 | 0.00 | 0.00 | 0.00 | 1.36 | 0.00 | 4.50 | 0.00 | 0.00 | 5.85 |
| Tesco, Boston Road South, Spalding | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.33 | 2.21 | 3.53 |
| Tesco, Market Place, Ely | 0 | 0.00 | 0.19 | 0.00 | 0.40 | 0.00 | 7.22 | 0.00 | 0.00 | 7.81 |
| Waitrose, Brays Lane, Ely | 0 | 0.00 | 0.00 | 0.00 | 0.13 | 0.00 | 1.26 | 0.19 | 0.00 | 1.58 |
| Other, Peterborough | 0 | 0.09 | 0.38 | 1.72 | 0.13 | 0.81 | 0.00 | 0.31 | 3.46 | 6.90 |
| Other, Kings Lynn | 0 | 0.74 | 0.36 | 0.13 | 0.00 | 0.00 | 0.00 | 4.73 | 1.42 | 7.38 |
| Other outside catchment | 0 | 0.34 | 0.19 | 0.72 | 0.49 | 5.73 | 3.63 | 5.39 | 0.80 | 17.29 |

Sub-Total Outside Catchment

| | | | | | | | | | | |
|--|--|-------------|-------------|--------------|-------------|--------------|--------------|--------------|--------------|--------------|
| | | 1.51 | 1.31 | 11.55 | 3.87 | 18.16 | 16.71 | 14.04 | 21.11 | 88.27 |
|--|--|-------------|-------------|--------------|-------------|--------------|--------------|--------------|--------------|--------------|

TOTAL

| | | | | | | | | | | |
|--|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| | | 29.21 | 31.74 | 22.62 | 18.27 | 34.77 | 23.00 | 35.75 | 37.84 | 233.21 |
|--|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|

SPREADSHEET CV2 - MARKET SHARES FOR CONVENIENCE SPENDING IN 2011

| | | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | TOTAL |
|--|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Population and Expenditure | | | | | | | | | | |
| Population 2011 | | 21,700 | 23,800 | 15,700 | 13,500 | 19,800 | 16,000 | 26,357 | 26,728 | 163,585 |
| Expenditure per capita in 2011 (in 2003 prices) £ | | 1,425 | 1,464 | 1,488 | 1,490 | 1,781 | 1,573 | 1,453 | 1,531 | |
| Total Expenditure 2011 £m | | 30.92 | 34.84 | 23.36 | 20.11 | 35.26 | 25.17 | 38.29 | 40.92 | 248.87 |
| Pattern of Convenience Spending in 2011 | | | | | | | | | | |
| Zone 1 | | | | | | | | | | |
| Asda, North End, Wisbech | 1 | 6.32 | 0.60 | 0.14 | 0.53 | 0.00 | 0.19 | 6.32 | 6.47 | 20.58 |
| Somerfield, Horse Fair, Wisbech | 1 | 6.59 | 0.00 | 0.66 | 0.00 | 0.00 | 0.00 | 0.82 | 0.49 | 8.56 |
| Tesco Superstore, Sandown Road, Wisbech | 1 | 12.97 | 0.21 | 0.21 | 0.00 | 0.00 | 0.19 | 11.11 | 6.59 | 31.28 |
| Other Wisbech | 1 | 3.16 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.32 | 1.16 | 6.64 |
| Zone 2 | | | | | | | | | | |
| Sainsburys, Mill View, March | 2 | 0.00 | 11.82 | 0.40 | 0.86 | 0.28 | 0.69 | 0.45 | 0.00 | 14.49 |
| Somerfield, High Street, March | 2 | 0.00 | 2.78 | 0.00 | 0.00 | 0.00 | 0.00 | 0.21 | 0.00 | 2.98 |
| Tesco Superstore, March Industrial Estate, March | 2 | 0.09 | 15.51 | 2.54 | 3.70 | 0.10 | 3.15 | 0.44 | 0.36 | 25.89 |
| Other March | 2 | 0.00 | 2.49 | 0.07 | 0.39 | 0.00 | 0.68 | 0.00 | 0.00 | 3.62 |
| Zone 3 | | | | | | | | | | |
| Somerfield, Blunts Lane, Peterborough | 3 | 0.00 | 0.00 | 6.19 | 0.00 | 0.00 | 0.00 | 0.00 | 0.14 | 6.33 |
| Other zone 3 | 3 | 0.00 | 0.00 | 0.65 | 0.00 | 0.00 | 0.19 | 0.00 | 0.00 | 0.84 |
| Zone 4 | | | | | | | | | | |
| Co-Op, Market Town Store, Bridge Street, Chatteris | 4 | 0.00 | 0.00 | 0.21 | 3.28 | 0.18 | 0.19 | 0.00 | 0.00 | 3.86 |
| Somerfield, High Street, Chatteris | 4 | 0.00 | 0.00 | 0.00 | 6.06 | 0.00 | 0.00 | 0.00 | 0.00 | 6.06 |
| Other Chatteris | 4 | 0.00 | 0.00 | 0.00 | 1.04 | 0.00 | 0.00 | 0.00 | 0.00 | 1.04 |
| Zone 5 | | | | | | | | | | |
| Co-Op, Rainbow Store, Newtown Road, Huntingdon | 5 | 0.18 | 0.00 | 0.07 | 0.00 | 9.67 | 0.00 | 0.00 | 0.47 | 10.40 |
| Somerfield, Great Whyte, Huntingdon | 5 | 0.00 | 0.00 | 0.07 | 0.00 | 5.06 | 0.00 | 0.00 | 0.00 | 5.13 |
| Other zone 5 | 5 | 0.00 | 0.00 | 0.00 | 0.00 | 1.56 | 0.00 | 0.00 | 0.00 | 1.56 |
| Zone 6 | | | | | | | | | | |
| Zone 6 stores | 6 | 0.00 | 0.00 | 0.07 | 0.00 | 0.00 | 1.61 | 0.00 | 0.00 | 1.68 |
| Zone 7 | | | | | | | | | | |
| Zone 7 stores | 7 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.58 | 0.00 | 1.58 |
| Zone 8 | | | | | | | | | | |
| Zone 8 stores | 8 | 0.00 | 0.00 | 0.15 | 0.00 | 0.00 | 0.00 | 0.00 | 2.40 | 2.55 |
| Sub-Total for Catchment | | 29.32 | 33.40 | 11.43 | 15.85 | 16.85 | 6.88 | 23.25 | 18.09 | 155.07 |
| Outside Catchment | | | | | | | | | | |
| Asda, Viersen Platz, Peterborough | 0 | 0.00 | 0.00 | 1.30 | 0.00 | 0.76 | 0.00 | 0.00 | 0.47 | 2.53 |
| Co-Op, Food Shop, West Street, Spalding | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.47 | 7.59 | 9.06 |
| Kwik Save, High Causeway, Peterborough | 0 | 0.00 | 0.00 | 1.35 | 0.00 | 0.18 | 0.00 | 0.00 | 0.00 | 1.53 |
| Morrisons, Wardentree Lane, Spalding | 0 | 0.18 | 0.00 | 0.00 | 0.00 | 0.18 | 0.00 | 0.44 | 2.37 | 3.18 |
| Sainsburys, Oxney Road, Peterborough | 0 | 0.18 | 0.00 | 1.38 | 0.00 | 0.00 | 0.00 | 0.00 | 2.78 | 4.34 |
| Tesco Express, Wertheim Way, Huntingdon | 0 | 0.00 | 0.00 | 0.07 | 0.59 | 2.41 | 0.12 | 0.33 | 0.00 | 3.52 |
| Tesco Extra, The Serpentine, Peterborough | 0 | 0.00 | 0.21 | 4.92 | 0.15 | 1.63 | 0.00 | 0.00 | 1.09 | 8.00 |
| Tesco Superstore, Abbots Ripton Road, Huntingdon | 0 | 0.00 | 0.00 | 0.26 | 0.75 | 6.61 | 0.00 | 0.00 | 0.00 | 7.62 |
| Tesco Superstore, Angel Drove, Ely | 0 | 0.00 | 0.00 | 0.00 | 1.49 | 0.00 | 4.92 | 0.00 | 0.00 | 6.41 |
| Tesco, Boston Road South, Spalding | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.42 | 2.39 | 3.81 |
| Tesco, Market Place, Ely | 0 | 0.00 | 0.21 | 0.00 | 0.44 | 0.00 | 7.90 | 0.00 | 0.00 | 8.56 |
| Waitrose, Brays Lane, Ely | 0 | 0.00 | 0.00 | 0.00 | 0.15 | 0.00 | 1.37 | 0.21 | 0.00 | 1.73 |
| Other, Peterborough | 0 | 0.09 | 0.42 | 1.77 | 0.15 | 0.83 | 0.00 | 0.33 | 3.74 | 7.33 |
| Other, Kings Lynn | 0 | 0.79 | 0.39 | 0.14 | 0.00 | 0.00 | 0.00 | 5.06 | 1.53 | 7.91 |
| Other outside catchment | 0 | 0.36 | 0.21 | 0.74 | 0.53 | 5.82 | 3.97 | 5.78 | 0.86 | 18.28 |
| Sub-Total Outside Catchment | | 1.60 | 1.44 | 11.93 | 4.26 | 18.42 | 18.29 | 15.03 | 22.83 | 93.81 |
| TOTAL | | 30.92 | 34.84 | 23.36 | 20.11 | 35.26 | 25.17 | 38.29 | 40.92 | 248.87 |

SPREADSHEET CV3 - MARKET SHARES FOR CONVENIENCE SPENDING IN 2016

| | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | TOTAL |
|---|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Population and Expenditure | | | | | | | | | |
| Population 2016 | 23,300 | 25,100 | 16,000 | 14,200 | 19,800 | 16,900 | 27,543 | 27,893 | 170,736 |
| Expenditure per capita in 2016 (in 2003 prices) £ | 1,482 | 1,523 | 1,548 | 1,550 | 1,853 | 1,637 | 1,511 | 1,593 | |
| Total Expenditure 2016 £m | 34.54 | 38.23 | 24.76 | 22.01 | 36.69 | 27.66 | 41.62 | 44.43 | 269.94 |

Market Shares for Convenience Spending in 2016

Zone 1

| | | | | | | | | | |
|---|---|--------|-------|-------|-------|-------|-------|--------|--------|
| Asda, North End, Wisbech | 1 | 20.45% | 1.73% | 0.59% | 2.66% | 0.00% | 0.75% | 16.52% | 15.80% |
| Somerfield, Horse Fair, Wisbech | 1 | 21.32% | 0.00% | 2.83% | 0.00% | 0.00% | 0.00% | 2.13% | 1.20% |
| Tesco Superstore, Sandown Road, Wisbech | 1 | 41.96% | 0.60% | 0.89% | 0.00% | 0.00% | 0.75% | 29.01% | 16.11% |
| Other Wisbech | 1 | 10.21% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 6.07% | 2.84% |

Zone 2

| | | | | | | | | | |
|--|---|-------|--------|--------|--------|-------|--------|-------|-------|
| Sainsburys, Mill View, March | 2 | 0.00% | 33.92% | 1.73% | 4.26% | 0.79% | 2.73% | 1.17% | 0.00% |
| Somerfield, High Street, March | 2 | 0.00% | 7.97% | 0.00% | 0.00% | 0.00% | 0.00% | 0.54% | 0.00% |
| Tesco Superstore, March Industrial Estate, March | 2 | 0.30% | 44.50% | 10.88% | 18.38% | 0.27% | 12.52% | 1.16% | 0.88% |
| Other March | 2 | 0.00% | 7.14% | 0.30% | 1.92% | 0.00% | 2.70% | 0.00% | 0.00% |

Zone 3

| | | | | | | | | | |
|---------------------------------------|---|-------|-------|--------|-------|-------|-------|-------|-------|
| Somerfield, Blunts Lane, Peterborough | 3 | 0.00% | 0.00% | 26.52% | 0.00% | 0.00% | 0.00% | 0.00% | 0.34% |
| Other zone 3 | 3 | 0.00% | 0.00% | 2.79% | 0.00% | 0.00% | 0.75% | 0.00% | 0.00% |

Zone 4

| | | | | | | | | | |
|--|---|-------|-------|-------|--------|-------|-------|-------|-------|
| Co-Op, Market Town Store, Bridge Street, Chatteris | 4 | 0.00% | 0.00% | 0.89% | 16.31% | 0.52% | 0.75% | 0.00% | 0.00% |
| Somerfield, High Street, Chatteris | 4 | 0.00% | 0.00% | 0.00% | 30.11% | 0.00% | 0.00% | 0.00% | 0.00% |
| Other Chatteris | 4 | 0.00% | 0.00% | 0.00% | 5.16% | 0.00% | 0.00% | 0.00% | 0.00% |

Zone 5

| | | | | | | | | | |
|--|---|-------|-------|-------|-------|--------|-------|-------|-------|
| Co-Op, Rainbow Store, Newtown Road, Huntingdon | 5 | 0.58% | 0.00% | 0.30% | 0.00% | 27.43% | 0.00% | 0.00% | 1.16% |
| Somerfield, Great Whyte, Huntingdon | 5 | 0.00% | 0.00% | 0.30% | 0.00% | 14.34% | 0.00% | 0.00% | 0.00% |
| Other zone 5 | 5 | 0.00% | 0.00% | 0.00% | 0.00% | 4.43% | 0.00% | 0.00% | 0.00% |

Zone 6

| | | | | | | | | | |
|---------------|---|-------|-------|-------|-------|-------|-------|-------|-------|
| Zone 6 stores | 6 | 0.00% | 0.00% | 0.30% | 0.00% | 0.00% | 6.40% | 0.00% | 0.00% |
|---------------|---|-------|-------|-------|-------|-------|-------|-------|-------|

Zone 7

| | | | | | | | | | |
|---------------|---|-------|-------|-------|-------|-------|-------|-------|-------|
| Zone 7 stores | 7 | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 4.13% | 0.00% |
|---------------|---|-------|-------|-------|-------|-------|-------|-------|-------|

Zone 8

| | | | | | | | | | |
|---------------|---|-------|-------|-------|-------|-------|-------|-------|-------|
| Zone 8 stores | 8 | 0.00% | 0.00% | 0.63% | 0.00% | 0.00% | 0.00% | 0.00% | 5.87% |
|---------------|---|-------|-------|-------|-------|-------|-------|-------|-------|

Sub-Total for Catchment

| | | | | | | | | |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | 94.82% | 95.86% | 48.94% | 78.81% | 47.78% | 27.33% | 60.73% | 44.20% |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|

Outside Catchment

| | | | | | | | | | |
|--|---|-------|-------|--------|-------|--------|--------|--------|--------|
| Asda, Viersen Platz, Peterborough | 0 | 0.00% | 0.00% | 5.56% | 0.00% | 2.14% | 0.00% | 0.00% | 1.16% |
| Co-Op, Food Shop, West Street, Spalding | 0 | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 3.83% | 18.55% |
| Kwik Save, High Causeway, Peterborough | 0 | 0.00% | 0.00% | 5.78% | 0.00% | 0.52% | 0.00% | 0.00% | 0.00% |
| Morrisons, Wardentree Lane, Spalding | 0 | 0.58% | 0.00% | 0.00% | 0.00% | 0.52% | 0.00% | 1.16% | 5.80% |
| Sainsburys, Oxney Road, Peterborough | 0 | 0.58% | 0.00% | 5.91% | 0.00% | 0.00% | 0.00% | 0.00% | 6.80% |
| Tesco Express, Wertheim Way, Huntingdon | 0 | 0.00% | 0.00% | 0.30% | 2.94% | 6.83% | 0.49% | 0.86% | 0.00% |
| Tesco Extra, The Serpentine, Peterborough | 0 | 0.00% | 0.60% | 21.07% | 0.74% | 4.63% | 0.00% | 0.00% | 2.66% |
| Tesco Superstore, Abbots Ripton Road, Huntingdon | 0 | 0.00% | 0.00% | 1.10% | 3.75% | 18.75% | 0.00% | 0.00% | 0.00% |
| Tesco Superstore, Angel Drove, Ely | 0 | 0.00% | 0.00% | 0.00% | 7.43% | 0.00% | 19.55% | 0.00% | 0.00% |
| Tesco, Boston Road South, Spalding | 0 | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 3.71% | 5.83% |
| Tesco, Market Place, Ely | 0 | 0.00% | 0.60% | 0.00% | 2.21% | 0.00% | 31.39% | 0.00% | 0.00% |
| Waitrose, Brays Lane, Ely | 0 | 0.00% | 0.00% | 0.00% | 0.74% | 0.00% | 5.46% | 0.54% | 0.00% |
| Other, Peterborough | 0 | 0.30% | 1.20% | 7.59% | 0.74% | 2.34% | 0.00% | 0.86% | 9.14% |
| Other, Kings Lynn | 0 | 2.54% | 1.13% | 0.59% | 0.00% | 0.00% | 0.00% | 13.23% | 3.74% |
| Other outside catchment | 0 | 1.18% | 0.60% | 3.17% | 2.66% | 16.49% | 15.79% | 15.08% | 2.11% |

Sub-Total Outside Catchment

| | | | | | | | | |
|--|-------|-------|--------|--------|--------|--------|--------|--------|
| | 5.18% | 4.14% | 51.06% | 21.19% | 52.22% | 72.67% | 39.27% | 55.80% |
|--|-------|-------|--------|--------|--------|--------|--------|--------|

TOTAL

| | | | | | | | | |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% | 100.00% |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|

Pattern of Convenience Spending in 2016

Zone 1

| | | | | | | | | | | |
|---|---|-------|------|------|------|------|------|-------|------|-------|
| Asda, North End, Wisbech | 1 | 7.06 | 0.66 | 0.14 | 0.58 | 0.00 | 0.21 | 6.88 | 7.02 | 22.56 |
| Somerfield, Horse Fair, Wisbech | 1 | 7.36 | 0.00 | 0.70 | 0.00 | 0.00 | 0.00 | 0.89 | 0.53 | 9.48 |
| Tesco Superstore, Sandown Road, Wisbech | 1 | 14.49 | 0.23 | 0.22 | 0.00 | 0.00 | 0.21 | 12.08 | 7.16 | 34.38 |
| Other Wisbech | 1 | 3.53 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.53 | 1.26 | 7.32 |

Zone 2

| | | | | | | | | | | |
|--|---|------|-------|------|------|------|------|------|------|-------|
| Sainsburys, Mill View, March | 2 | 0.00 | 12.97 | 0.43 | 0.94 | 0.29 | 0.75 | 0.49 | 0.00 | 15.86 |
| Somerfield, High Street, March | 2 | 0.00 | 3.05 | 0.00 | 0.00 | 0.00 | 0.00 | 0.22 | 0.00 | 3.27 |
| Tesco Superstore, March Industrial Estate, March | 2 | 0.10 | 17.01 | 2.69 | 4.05 | 0.10 | 3.46 | 0.48 | 0.39 | 28.29 |
| Other March | 2 | 0.00 | 2.73 | 0.07 | 0.42 | 0.00 | 0.75 | 0.00 | 0.00 | 3.97 |

SPREADSHEET CV3 - MARKET SHARES FOR CONVENIENCE SPENDING IN 2016

| | | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | TOTAL |
|--|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Population and Expenditure | | | | | | | | | | |
| Population 2016 | | 23,300 | 25,100 | 16,000 | 14,200 | 19,800 | 16,900 | 27,543 | 27,893 | 170,736 |
| Expenditure per capita in 2016 (in 2003 prices) £ | | 1,482 | 1,523 | 1,548 | 1,550 | 1,853 | 1,637 | 1,511 | 1,593 | |
| Total Expenditure 2016 £m | | 34.54 | 38.23 | 24.76 | 22.01 | 36.69 | 27.66 | 41.62 | 44.43 | 269.94 |
| Zone 3 | | | | | | | | | | |
| Somerfield, Blunts Lane, Peterborough | 3 | 0.00 | 0.00 | 6.57 | 0.00 | 0.00 | 0.00 | 0.00 | 0.15 | 6.72 |
| Other zone 3 | 3 | 0.00 | 0.00 | 0.69 | 0.00 | 0.00 | 0.21 | 0.00 | 0.00 | 0.90 |
| Zone 4 | | | | | | | | | | |
| Co-Op, Market Town Store, Bridge Street, Chatteris | 4 | 0.00 | 0.00 | 0.22 | 3.59 | 0.19 | 0.21 | 0.00 | 0.00 | 4.21 |
| Somerfield, High Street, Chatteris | 4 | 0.00 | 0.00 | 0.00 | 6.63 | 0.00 | 0.00 | 0.00 | 0.00 | 6.63 |
| Other Chatteris | 4 | 0.00 | 0.00 | 0.00 | 1.14 | 0.00 | 0.00 | 0.00 | 0.00 | 1.14 |
| Zone 5 | | | | | | | | | | |
| Co-Op, Rainbow Store, Newtown Road, Huntingdon | 5 | 0.20 | 0.00 | 0.07 | 0.00 | 10.06 | 0.00 | 0.00 | 0.52 | 10.85 |
| Somerfield, Great Whyte, Huntingdon | 5 | 0.00 | 0.00 | 0.07 | 0.00 | 5.26 | 0.00 | 0.00 | 0.00 | 5.34 |
| Other zone 5 | 5 | 0.00 | 0.00 | 0.00 | 0.00 | 1.62 | 0.00 | 0.00 | 0.00 | 1.62 |
| Zone 6 | | | | | | | | | | |
| Zone 6 stores | 6 | 0.00 | 0.00 | 0.07 | 0.00 | 0.00 | 1.77 | 0.00 | 0.00 | 1.84 |
| Zone 7 | | | | | | | | | | |
| Zone 7 stores | 7 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.72 | 0.00 | 1.72 |
| Zone 8 | | | | | | | | | | |
| Zone 8 stores | 8 | 0.00 | 0.00 | 0.16 | 0.00 | 0.00 | 0.00 | 0.00 | 2.61 | 2.76 |
| Sub-Total for Catchment | | 32.75 | 36.65 | 12.12 | 17.34 | 17.53 | 7.56 | 25.28 | 19.64 | 168.87 |
| Outside Catchment | | | | | | | | | | |
| Asda, Viersen Platz, Peterborough | 0 | 0.00 | 0.00 | 1.38 | 0.00 | 0.79 | 0.00 | 0.00 | 0.52 | 2.68 |
| Co-Op, Food Shop, West Street, Spalding | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.60 | 8.24 | 9.84 |
| Kwik Save, High Causeway, Peterborough | 0 | 0.00 | 0.00 | 1.43 | 0.00 | 0.19 | 0.00 | 0.00 | 0.00 | 1.62 |
| Morrisons, Wardentree Lane, Spalding | 0 | 0.20 | 0.00 | 0.00 | 0.00 | 0.19 | 0.00 | 0.48 | 2.58 | 3.45 |
| Sainsburys, Oxney Road, Peterborough | 0 | 0.20 | 0.00 | 1.46 | 0.00 | 0.00 | 0.00 | 0.00 | 3.02 | 4.68 |
| Tesco Express, Wertheim Way, Huntingdon | 0 | 0.00 | 0.00 | 0.07 | 0.65 | 2.51 | 0.13 | 0.36 | 0.00 | 3.72 |
| Tesco Extra, The Serpentine, Peterborough | 0 | 0.00 | 0.23 | 5.22 | 0.16 | 1.70 | 0.00 | 0.00 | 1.18 | 8.49 |
| Tesco Superstore, Abbots Ripton Road, Huntingdon | 0 | 0.00 | 0.00 | 0.27 | 0.83 | 6.88 | 0.00 | 0.00 | 0.00 | 7.98 |
| Tesco Superstore, Angel Drove, Ely | 0 | 0.00 | 0.00 | 0.00 | 1.64 | 0.00 | 5.41 | 0.00 | 0.00 | 7.04 |
| Tesco, Boston Road South, Spalding | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.55 | 2.59 | 4.14 |
| Tesco, Market Place, Ely | 0 | 0.00 | 0.23 | 0.00 | 0.49 | 0.00 | 8.68 | 0.00 | 0.00 | 9.40 |
| Waitrose, Brays Lane, Ely | 0 | 0.00 | 0.00 | 0.00 | 0.16 | 0.00 | 1.51 | 0.22 | 0.00 | 1.90 |
| Other, Peterborough | 0 | 0.10 | 0.46 | 1.88 | 0.16 | 0.86 | 0.00 | 0.36 | 4.06 | 7.88 |
| Other, Kings Lynn | 0 | 0.88 | 0.43 | 0.14 | 0.00 | 0.00 | 0.00 | 5.51 | 1.66 | 8.62 |
| Other outside catchment | 0 | 0.41 | 0.23 | 0.79 | 0.58 | 6.05 | 4.37 | 6.28 | 0.94 | 19.64 |
| Sub-Total Outside Catchment | | 1.79 | 1.58 | 12.65 | 4.66 | 19.16 | 20.10 | 16.34 | 24.79 | 101.08 |
| TOTAL | | 34.54 | 38.23 | 24.76 | 22.01 | 36.69 | 27.66 | 41.62 | 44.43 | 269.94 |

SPREADSHEET CV4 - MARKET SHARES FOR CONVENIENCE SPENDING IN 2021

| | | Zone 1 | Zone 2 | Zone 3 | Zone 4 | Zone 5 | Zone 6 | Zone 7 | Zone 8 | TOTAL |
|--|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Population and Expenditure | | | | | | | | | | |
| Population 2021 | | 25,100 | 26,600 | 16,400 | 14,800 | 19,800 | 17,800 | 28,750 | 29,080 | 178,330 |
| Expenditure per capita in 2021 (in 2003 prices) £ | | 1,550 | 1,593 | 1,619 | 1,621 | 1,938 | 1,712 | 1,580 | 1,666 | |
| Total Expenditure 2021 £m | | 38.91 | 42.37 | 26.55 | 23.99 | 38.37 | 30.47 | 45.44 | 48.44 | 294.54 |
| Pattern of Convenience Spending in 2021 | | | | | | | | | | |
| Zone 1 | | | | | | | | | | |
| Asda, North End, Wisbech | 1 | 7.96 | 0.73 | 0.16 | 0.64 | 0.00 | 0.23 | 7.51 | 7.66 | 24.87 |
| Somerfield, Horse Fair, Wisbech | 1 | 8.30 | 0.00 | 0.75 | 0.00 | 0.00 | 0.00 | 0.97 | 0.58 | 10.60 |
| Tesco Superstore, Sandown Road, Wisbech | 1 | 16.32 | 0.25 | 0.24 | 0.00 | 0.00 | 0.23 | 13.18 | 7.80 | 38.03 |
| Other Wisbech | 1 | 3.97 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 2.76 | 1.38 | 8.11 |
| Zone 2 | | | | | | | | | | |
| Sainsburys, Mill View, March | 2 | 0.00 | 14.37 | 0.46 | 1.02 | 0.30 | 0.83 | 0.53 | 0.00 | 17.52 |
| Somerfield, High Street, March | 2 | 0.00 | 3.38 | 0.00 | 0.00 | 0.00 | 0.00 | 0.25 | 0.00 | 3.62 |
| Tesco Superstore, March Industrial Estate, March | 2 | 0.12 | 18.86 | 2.89 | 4.41 | 0.10 | 3.81 | 0.53 | 0.43 | 31.14 |
| Other March | 2 | 0.00 | 3.02 | 0.08 | 0.46 | 0.00 | 0.82 | 0.00 | 0.00 | 4.39 |
| Zone 3 | | | | | | | | | | |
| Somerfield, Blunts Lane, Peterborough | 3 | 0.00 | 0.00 | 7.04 | 0.00 | 0.00 | 0.00 | 0.00 | 0.17 | 7.20 |
| Other zone 3 | 3 | 0.00 | 0.00 | 0.74 | 0.00 | 0.00 | 0.23 | 0.00 | 0.00 | 0.97 |
| Zone 4 | | | | | | | | | | |
| Co-Op, Market Town Store, Bridge Street, Chatteris | 4 | 0.00 | 0.00 | 0.24 | 3.91 | 0.20 | 0.23 | 0.00 | 0.00 | 4.58 |
| Somerfield, High Street, Chatteris | 4 | 0.00 | 0.00 | 0.00 | 7.22 | 0.00 | 0.00 | 0.00 | 0.00 | 7.22 |
| Other Chatteris | 4 | 0.00 | 0.00 | 0.00 | 1.24 | 0.00 | 0.00 | 0.00 | 0.00 | 1.24 |
| Zone 5 | | | | | | | | | | |
| Co-Op, Rainbow Store, Newtown Road, Huntingdon | 5 | 0.23 | 0.00 | 0.08 | 0.00 | 10.52 | 0.00 | 0.00 | 0.56 | 11.39 |
| Somerfield, Great Whyte, Huntingdon | 5 | 0.00 | 0.00 | 0.08 | 0.00 | 5.50 | 0.00 | 0.00 | 0.00 | 5.58 |
| Other zone 5 | 5 | 0.00 | 0.00 | 0.00 | 0.00 | 1.70 | 0.00 | 0.00 | 0.00 | 1.70 |
| Zone 6 | | | | | | | | | | |
| Zone 6 stores | 6 | 0.00 | 0.00 | 0.08 | 0.00 | 0.00 | 1.95 | 0.00 | 0.00 | 2.03 |
| Zone 7 | | | | | | | | | | |
| Zone 7 stores | 7 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.88 | 0.00 | 1.88 |
| Zone 8 | | | | | | | | | | |
| Zone 8 stores | 8 | 0.00 | 0.00 | 0.17 | 0.00 | 0.00 | 0.00 | 0.00 | 2.84 | 3.01 |
| Sub-Total for Catchment | | 36.90 | 40.62 | 12.99 | 18.91 | 18.33 | 8.33 | 27.60 | 21.41 | 185.08 |
| Outside Catchment | | | | | | | | | | |
| Asda, Viersen Platz, Peterborough | 0 | 0.00 | 0.00 | 1.48 | 0.00 | 0.82 | 0.00 | 0.00 | 0.56 | 2.86 |
| Co-Op, Food Shop, West Street, Spalding | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.74 | 8.99 | 10.73 |
| Kwik Save, High Causeway, Peterborough | 0 | 0.00 | 0.00 | 1.53 | 0.00 | 0.20 | 0.00 | 0.00 | 0.00 | 1.73 |
| Morrisons, Wardentree Lane, Spalding | 0 | 0.23 | 0.00 | 0.00 | 0.00 | 0.20 | 0.00 | 0.53 | 2.81 | 3.76 |
| Sainsburys, Oxney Road, Peterborough | 0 | 0.23 | 0.00 | 1.57 | 0.00 | 0.00 | 0.00 | 0.00 | 3.29 | 5.09 |
| Tesco Express, Wertheim Way, Huntingdon | 0 | 0.00 | 0.00 | 0.08 | 0.71 | 2.62 | 0.15 | 0.39 | 0.00 | 3.94 |
| Tesco Extra, The Serpentine, Peterborough | 0 | 0.00 | 0.25 | 5.59 | 0.18 | 1.78 | 0.00 | 0.00 | 1.29 | 9.09 |
| Tesco Superstore, Abbots Ripton Road, Huntingdon | 0 | 0.00 | 0.00 | 0.29 | 0.90 | 7.19 | 0.00 | 0.00 | 0.00 | 8.39 |
| Tesco Superstore, Angel Drive, Ely | 0 | 0.00 | 0.00 | 0.00 | 1.78 | 0.00 | 5.96 | 0.00 | 0.00 | 7.74 |
| Tesco, Boston Road South, Spalding | 0 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.69 | 2.83 | 4.51 |
| Tesco, Market Place, Ely | 0 | 0.00 | 0.25 | 0.00 | 0.53 | 0.00 | 9.57 | 0.00 | 0.00 | 10.35 |
| Waitrose, Brays Lane, Ely | 0 | 0.00 | 0.00 | 0.00 | 0.18 | 0.00 | 1.66 | 0.25 | 0.00 | 2.08 |
| Other, Peterborough | 0 | 0.12 | 0.51 | 2.02 | 0.18 | 0.90 | 0.00 | 0.39 | 4.43 | 8.53 |
| Other, Kings Lynn | 0 | 0.99 | 0.48 | 0.16 | 0.00 | 0.00 | 0.00 | 6.01 | 1.81 | 9.45 |
| Other outside catchment | 0 | 0.46 | 0.25 | 0.84 | 0.64 | 6.33 | 4.81 | 6.85 | 1.02 | 21.21 |
| Sub-Total Outside Catchment | | 2.01 | 1.75 | 13.56 | 5.08 | 20.04 | 22.14 | 17.84 | 27.03 | 109.46 |
| TOTAL | | 38.91 | 42.37 | 26.55 | 23.99 | 38.37 | 30.47 | 45.44 | 48.44 | 294.54 |

**Spreadsheet CV5 - Summary of Capacity, Convenience Goods Base
Scenario A - Constant Retention**

| | 2006 | 2011 | 2016 | 2021 | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-21 |
|--|-------------|-------------|-------------|-------------|---------------------------|---------------------------|---------------------------|---------------------------|
| Total Population | 156,079 | 163,585 | 170,736 | 178,330 | 7,506 | 7,152 | 7,593 | 22,251 |
| Total Expenditure £m | 233.2 | 248.9 | 269.9 | 294.5 | 15.7 | 21.1 | 24.6 | 61.3 |
| Retained Expenditure £m | 144.9 | 154.7 | 167.8 | 183.1 | 9.7 | 13.1 | 15.3 | 38.1 |
| Retained Expenditure % | 62 | 62 | 62 | 62 | | | | |
| Leakage £m | 88.3 | 94.2 | 102.2 | 111.5 | 5.9 | 8.0 | 9.3 | 23.2 |
| Inflow £m | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Total Turnover of Convenience Stores in OCA £m | 144.9 | 154.7 | 167.8 | 183.1 | 9.7 | 13.1 | 15.3 | 38.1 |
| Initial Surplus £m/annum (Growth in Retained Expenditure) | | | | | 9.7 | 13.1 | 15.3 | 38.1 |
| Claims on Expenditure | | | | | | | | |
| Existing Traders | 0 | 1.5 | 2.9 | 4.4 | 1.5 | 1.5 | 1.5 | 4.4 |
| Commitments | 0 | 14.6 | 14.8 | 14.9 | 14.6 | 0.1 | 0.1 | 14.9 |
| Impact on capacity £m | 0 | 16.1 | 17.7 | 19.3 | 16.1 | 1.6 | 1.6 | 19.3 |
| SUMMARY | | | | | 2006-11 | 2011-16 | 2016-21 | 2006-21 |
| Initial surplus £m | | | | | 9.7 | 13.1 | 15.3 | 38.1 |
| Claims on capacity £m | | | | | 16.1 | 1.6 | 1.6 | 19.3 |
| RESIDUAL £m | | | | | -6.4 | 11.5 | 13.7 | 18.8 |
| Turnover per sq m ('High' Scenario) | | | | | 11,110 | 11,222 | 11,335 | |
| Net Floorspace Requirement sq m ('High' Scenario) | | | | | -572 | 1,023 | 1,204 | 1,655 |
| Gross Floorspace Requirement sq m ('High' Scenario) | | | | | -954 | 1,705 | 2,007 | 2,758 |
| Turnover per sq m ('Low' Scenario) | | | | | 6,060 | 6,121 | 6,183 | |
| Net Floorspace Requirement sq m ('Low' Scenario) | | | | | -1,049 | 1,875 | 2,208 | 3,034 |
| Gross Floorspace Requirement sq m ('Low' Scenario) | | | | | -1,749 | 3,126 | 3,680 | 5,057 |

**Spreadsheet CV6 - Summary of Capacity, Convenience Goods Base
Scenario B - Increasing Retention**

| | 2006 | 2011 | 2016 | 2021 | Change 2006-11 | Change 2011-16 | Change 2016-21 | Change 2006-21 |
|--|-------------|-------------|-------------|-------------|---------------------------|---------------------------|---------------------------|---------------------------|
| Total Population | 156,079 | 163,585 | 170,736 | 178,330 | 7,506 | 7,152 | 7,593 | 22,251 |
| Total Expenditure £m | 233.2 | 248.9 | 269.9 | 294.5 | 15.7 | 21.1 | 24.6 | 61.3 |
| Retained Expenditure £m | 144.9 | 161.8 | 183.6 | 206.2 | 16.8 | 21.8 | 22.6 | 61.2 |
| Retained Expenditure % | 62 | 65 | 68 | 70 | | | | |
| Leakage £m | 88.3 | 87.1 | 86.4 | 88.4 | -1.2 | -0.7 | 2.0 | 0.1 |
| Inflow £m | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 |
| Total Turnover of Convenience Stores in OCA £m | 144.9 | 161.8 | 183.6 | 206.2 | 16.8 | 21.8 | 22.6 | 61.2 |
| Initial Surplus £m/annum (Growth in Retained Expenditure) | | | | | 16.8 | 21.8 | 22.6 | 61.2 |
| Claims on Expenditure | | | | | | | | |
| Existing Traders | 0 | 1.5 | 2.9 | 4.4 | 1.5 | 1.5 | 1.5 | 4.4 |
| Commitments | 0 | 14.6 | 14.8 | 14.9 | 14.6 | 0.1 | 0.1 | 14.9 |
| Impact on capacity £m | 0 | 16.1 | 17.7 | 19.3 | 16.1 | 1.6 | 1.6 | 19.3 |
| SUMMARY | | | | | 2006-11 | 2011-16 | 2016-21 | 2006-21 |
| Initial surplus £m | | | | | 16.8 | 21.8 | 22.6 | 61.2 |
| Claims on capacity £m | | | | | 16.1 | 1.6 | 1.6 | 19.3 |
| RESIDUAL £m | | | | | 0.7 | 20.2 | 21.0 | 41.9 |
| Turnover per sq m ('High' Scenario) | | | | | 11,110 | 11,222 | 11,335 | |
| Net Floorspace Requirement sq m ('High' Scenario) | | | | | 66 | 1,798 | 1,851 | 3,715 |
| Gross Floorspace Requirement sq m ('High' Scenario) | | | | | 111 | 2,997 | 3,085 | 6,192 |
| Turnover per sq m ('Low' Scenario) | | | | | 6,060 | 6,121 | 6,183 | |
| Net Floorspace Requirement sq m ('Low' Scenario) | | | | | 122 | 3,296 | 3,394 | 6,812 |
| Gross Floorspace Requirement sq m ('Low' Scenario) | | | | | 203 | 5,494 | 5,656 | 11,353 |

Leisure Sector Analysis (Capacity at 2021 based on 2006 apportionments)

| COICOPS Category | COICOPS Description | COICOPS Category Dispersion of Total Leisure Spend (%) | COICOPS sub-category | Current (2006) Sub-Category Dispersion of COICOPS Category Leisure Spend (%) | Capacity by COICOPS Sub-category (£) |
|-------------------------|------------------------------|---|------------------------------|---|---|
| 9.4.2 | Cultural services | 14.50 | Cinemas | 5.10 | 716,703 |
| 9.4.3 | Games of chance | 9.20 | Bingo | 7.29 | 649,855 |
| 9.4.3 | Games of chance | 9.20 | Casinos | 9.24 | 824,306 |
| 11.1.1 | Restaurants, cafés, bars etc | 60.9 | Restaurants, cafés, bars etc | 100.0 | 59,022,561 |