NORTHSTOWE
PHASE 2 PLANNING APPLICATION

Town Centre Retail Impact Assessment

August 2014

Homes & Communities Agency

Northstowe Phase 2
Outline Planning Application

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Contents

1 Introduction

1.1 This report is submitted as a supporting document of the planning application for Phase 2 of the new settlement at Northstowe, submitted by the Homes and Communities Agency (HCA). The report describes the strategy and economic potential for a new town centre in Northstowe, as well as its impact on existing and committed shopping facilities in the area.

1.2 A planning application (reference S/0388/12/OL) was made by Gallagher Longstanton Ltd in March 2012 for Phase 1 of the new settlement, which included 1,500 new homes, five hectares of employment land, and a local centre. The application was supported by a Development Framework Document (DFD), which described the vision, proposed master-planning strategy, phasing and delivery of the proposals. At the request of Natural England, some amendments were made to the application in June 2012. The application was approved in April 2014.

1.3 The planning justification for the a new community at Northstowe is set out in the Northstowe Area Action Plan (NAAP) which was adopted by South Cambridgeshire District Council in July 2007. The NAAP makes provision for a town centre in Northstowe, which is to be close to the geographical centre of the settlement and on the dedicated guided busway route through the town.

1.4 Although the planning justification for a new town centre (and local centres) has already been established by planning policy, its scale and form is to be determined through this Phase 2 application, in accordance with the requirements of national and local policy guidance, to which reference is made in Section 2 of the report.

1.5 The town centre proposals have been designed and phased so as to serve the settlement as a whole once completed. Whereas the Phase 2 application includes 3,500 new homes, the total number of homes when the settlement is complete is expected to be some 10,000. Further details of the proposals are provided in the submitted Planning Statement and Town Centre Strategy documents.

Scope of Report

1.6 This report has been prepared as one of a number of documents supporting the Phase 2 application. The principal matters addressed in the report are:

- A quantitative assessment of the economic potential and implications for existing shopping centres and facilities of the retail floorspace proposals for the proposed Northstowe town centre:

- A qualitative review of the planning policy justification within the proposed town centre for employment uses, commercial leisure / entertainment uses, food drink and other retail services, public services and community uses.

1.7 The quantitative retail floorspace assessment is based on forecast expenditure and floorspace requirements up to 2031 only. Although development of the settlement will continue after this date, the period after 2031 is too long a time period over which to make any meaningful quantitative assessments. It is also too far into the future for the market to be much influenced by at the present time. However, the likely scale of housing completions post 2031 indicates that there needs to be space within the town centre where further expansion could take place in the future. The master-plan for the town centre has regard to this.

1.8 As part of the context for the assessments, the planning policy framework upon which proposals for a new town centre in Northstowe must be based is reviewed, in addition to the findings of other recent retail studies of the area. The assessment has been undertaken in accordance with the requirements of national planning guidance and planning policies for the area.

2 Planning Policy Guidance

2.1 We describe below the national planning guidance and local planning policy that is relevant to the scale and form of a new town centre for Northstowe.

Local Planning Policy

2.2 The South Cambridgeshire Local Development Framework (LDF) consists of a suite of documents adopted between January 2007 and January 2010. Specific LDF documents are currently being reviewed in the process of preparing a new Local Plan (as required by the NPPF).

South Cambridgeshire Core Strategy DPD 2007

2.3 The South Cambridgeshire Core Strategy was adopted in January 2007 and covers the period up to 2016. Paragraph 2.10 of the Strategy identifies Northstowe as the location for *"a small new town of up to 10,000 homes of which 4,800 homes will be provided by 2016"*. It also states that the new town will include a town centre serving the town and the nearby villages; and that the new town proposal is to be subject of a separate Action Area Plan.

2.4 Paragraph 2.34 (referring to Structure Plan Policy P9/10, which indicates that proposals for major sub-regional shopping provision in South Cambridgeshire are unlikely to receive planning permission) states the following in respect of Northstowe.

> *"Exceptionally, in Northstowe, there will be a need for convenience and comparison floor area provision of a scale in excess of these thresholds, which ensures that the settlement is sustainable. However, the District Council does not intend that Northstowe should perform a sub-regional shopping role that has a significant impact on the role of Cambridge. Further guidance on proposals for convenience and comparison retail in Northstowe is contained in the Northstowe Area Action Plan."*

Northstowe Action Area Plan 2007

2.5 The most detailed policy framework for Northstowe is provided by the adopted Northstowe Area Action Plan (AAP), which was adopted in July 2007. The AAP will not be superseded by the emerging South Cambridgeshire Local Plan, see below. The AAP identifies the site for a sustainable new town with a target size of 10,000 dwellings and associated development.

2.6 The objectives for the Town Centre are set out under the heading **D1 The Town Centre**, which states:

"D1/a. To provide a vibrant and diverse town centre which is located at the heart of Northstowe where it will be as accessible to all of the town's population by walking, cycling and public transport.

D1/b. To maximize accessibility and usability within the town centre.

D1/c. To provide a town centre with shops, services, cultural, leisure and community facilities to serve the needs of Northstowe and the immediately surrounding area which will not undermine the vitality and viability of nearby market towns or compete with Cambridge.

D1/d. To provide a town centre with a large number and range of comparison and convenience shops and other units and spaces which will create an attractive urban environment at the heart of Northstowe.

D1/e. To ensure that no single store sells a range of comparison and convenience goods that would threaten the development of the remainder of the town centre.

D1/f. To create a high quality and varied built and open space environment where people will wish to shop and find their services and facilities, both day and evening.

D1/g. To support the success of the town centre by locating uses which will generate additional custom and activity in and around the centre including employment, housing and other services and facilities which will provide the opportunity to combine trips.

D1/h. To provide access to the wider road network for visitors to the town centre and car parking of a scale appropriate to a modest sized town with a limited catchment area.

D1/i. To secure an early start to the development of the town centre to help create an identity for Northstowe at the earliest opportunity."

2.7 **Policy NS/5** sets out policies for the location and form of the town centre and requires submission of a 'Town Centre Strategy' as part of the initial application for planning permission demonstrating the vitality and viability of the town centre.

"Town Centre Location:

1. The detailed location of the town centre at Northstowe will be determined as part of the Masterplan to be approved by the local planning authority and will be:

> *a. Close to the geographical centre of the town where it will be most accessible to the population of Northstowe as a whole;*
>
> *b. On the dedicated local busway route through the town in order to maximise accessibility to all of the town's residents.*

Town Centre Form:

2. The town centre will make provision for such a range of shops, services, cultural, leisure, entertainment and community facilities that will serve the needs of Northstowe *and the immediately surrounding area without undermining the vitality and viability of nearby village centres and market towns or compete with Cambridge, having regard to the sequential test. It should have landmarks (both built and natural) and other points of interest, including public art, to create a legible sense of place.*

3. Parking provision for cars and cycles will be included in the form of public car and cycle parks for the town centre of a size consistent with its role as a small market town.

Vitality and Viability:

4. A Town Centre Strategy for Northstowe will be submitted for approval by the local planning authority as part of the application for initial planning permission."

2.8 Paragraph D1.8 indicates the range of uses that are to be provided for in the Town Centre.

"Town centre uses will include shops, restaurants, public houses / bars commercial services (such as banks, building societies, post office), commercial leisure uses such as a cinema, library and lifelong learning centre, health facilities, cultural facilities, places of worship and public services, including the administrative buildings for Northstowe (a Town Council will be needed) (see also chapter on Community Facilities, Leisure, Art and Culture including Community Development). Locating employment opportunities in and well related to the town centre will ensure that people working in Northstowe will have safe and convenient access to its shops and facilities and help support a viable and vital town centre (see also Employment chapter)."

2.9 **Policy NS/6** sets out the criteria for the creation of Local Centres within Northstowe. The two local centres proposed in Northstowe are within Phase 1 and subsequent phases. No local centres are proposed as part of the Phase 2 application.

South Cambridgeshire Submission Local Plan (March 2014)

2.10 On 28 March 2014, the Local Plan and its supporting documents were submitted for independent examination to the Secretary of State for Communities and Local Government.

2.11 **Policy S/6** sets out the development strategy for the District to 2031 confirming that the major site allocations at Northstowe (and other 'strategic sites' within the District) as identified in the AAPs will carried forward as part of the development plan to 2031, or until such time as the developments are complete.

2.12 The proposed retail hierarchy for the District is described in **Policy E/21 Retail Hierarchy**, which says:

"A retail hierarchy of preferred centres will be taken into account in considering proposals for retail development. Any proposals for new retail provision in these centres should be in scale with their position in the hierarchy. The hierarchy of centres in South Cambridgeshire is as follows:

a. Northstowe and Waterbeach (new towns) town centres;

b. Rural Centres' village centres;

c. Other village centres (Minor Rural Centres, Group Villages and Infill Villages)."

2.13 The strategy for Northstowe is described in paragraph 8.69, which says:

"The centres at the new towns of Northstowe and Waterbeach will also be considered as town centres in the hierarchy. For both new towns, there will be a need for convenience and comparison floor area provision of a scale necessary to ensure that the settlements are sustainable. However, the Council does not intend that either new town should perform a sub-regional shopping role that has a significant impact on the role of Cambridge."

National Planning Guidance

National Planning Policy Framework 2012

2.14 National planning policy guidance is set out in the National Planning Policy Framework, March 2012 (NPPF). This indicates the tests that the application proposal will be required to satisfy. The NPPF emphasises the government's commitment to the achievement of sustainable development. The South Cambridgeshire Core Strategy proposals for the provision of new centres within Northstowe (see below) are consistent with this. The NPPF indicates the need for planning policies to be positive and to promote competitive town centre environments, identifying actions for the management and growth of centres over time.

2.15 The NPPF requires that Local Plans *inter alia* should:

"promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;

"allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres.

2.16 Although these provisions require local authorities to assess the 'need' for 'main town centre uses' as part of their plan-making function, assessments of 'need' are no longer required to support planning applications for new development. Notwithstanding this requirement being removed at the planning application stage, as apart of these Phase 2 application proposals an assessment of retail capacity created by the new settlement proposals has been made, as well as an assessment of retail impact. The assessment demonstrates that the scale and type of floorspace proposed is consistent with the established planning strategy for a new town centre in Northstowe referred to above.

2.17 The NPPF Guidance (paragraph 24) requires a sequential test to be applied to planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date Local Plan. The application proposals for a new town centre at Northstowe accord with the provisions for a new town centre set out in the Northstowe Action Area Plan 2007 (NAAP) (see above). Provided that the application proposals for the new town centre are consistent with the specifications for the town centre set out in the approved planning strategy, any sequential test requirements are satisfied. This is addressed in Section 6 of the report.

2.18 In respect of 'impact' paragraph 26 of the NPPF says:

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

- *the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and*
- *the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made."*

2.19 We have stated above that the application proposals for a new town centre at Northstowe are consistent with the approved planning strategy for Northstowe, which makes provision for a new town centre within the settlement. No floorspace thresholds for the new town centre are included with approved planning strategy. However, the strategy *inter alia* does require that proposals for the town centre do not undermine the vitality and viability of nearby village centres and market towns or compete with Cambridge. Such potential adverse impacts would be determined by the scale and type of floorspace proposed.

2.20 The town centre proposals are plainly in excess of the specified floorspace threshold requiring an impact assessment. An impact assessment is provided, the purpose of which is to demonstrate that town centre proposals are consistent with the approved planning strategy for Northstowe town centre, and in particular that the scale and type of floorspace proposed will not undermine the vitality and viability of any nearby centres.

Planning Practice Guidance, 2014

2.21 Following a period of consultation the government's Planning Practice Guidance (PPG), which is to be read alongside the NPPF, was published on 6 March 2014. The purpose of the PPG is to explain in more detail the guidance in the NPPF, but clearly the PPG must be in conformity with the NPPF.

2.22 The PPG includes a section 'Ensuring the vitality of town centres', which includes sub-sections on the 'sequential test' and 'impact test', specifying in more detail than the NPPF the considerations to be examined when applying these tests. Because the PPG is new, its provisions in respect of the sequential and impact tests are set out in some detail.

Sequential Test

2.23 The PPG confirms the nature of the sequential test.

"The sequential test guides main town centre uses towards town centre locations first, then, if no town centre locations are available, to edge of centre locations, and, if

neither town centre locations nor edge of centre locations are available, to out of town centre locations, with preference for accessible sites which are well connected to the town centre. It supports the viability and vitality of town centres by placing existing town centres foremost in both plan-making and decision-taking."

2.24 It provides a checklist of the considerations that should be taken into account in determining whether a proposal complies with the sequential test. Because the application proposal is for a new town centre in accordance with the approved planning strategy for Northstowe, these are of limited relevance in this case.

2.25 The PPG confirms that, in line with paragraph 27 of the NPPF, where a proposal fails to satisfy the sequential test it should be refused.

Impact Test

2.26 The PPG confirms the nature of the impact test.

"The purpose of the test is to ensure that the impact over time (up to five years (ten for major schemes)) of certain out of centre and edge of centre proposals on existing town centres is not significantly adverse. The test relates to retail, office and leisure development (not all main town centre uses) which are not in accordance with an up to date Local Plan and outside of existing town centres. It is important that the impact is assessed in relation to all town centres that may be affected, which are not necessarily just those closest to the proposal and may be in neighbouring authority areas."

2.27 It indicates that the following steps should be taken in applying the impact test.

- *"establish the state of existing centres and the nature of current shopping patterns (base year)*
- *determine the appropriate time frame for assessing impact, focusing on impact in the first five years, as this is when most of the impact will occur*
- *examine the 'no development' scenario (which should not necessarily be based on the assumption that all centres are likely to benefit from expenditure growth in convenience and comparison goods and reflect both changes in the market or role of centres, as well as changes in the environment such as new infrastructure);*
- *assess the proposal's turnover and trade draw (drawing on information from comparable schemes, the operator's benchmark turnover of convenience and comparison goods, and carefully considering likely catchments and trade draw)*
- *consider a range of plausible scenarios in assessing the impact of the proposal on existing centres and facilities (which may require breaking the study area down into a series of zones to gain a finer-grain analysis of anticipated impact)*
- *set out the likely impact of that proposal clearly, along with any associated assumptions or reasoning, including in respect of quantitative and qualitative issues*

- *any conclusions should be proportionate: for example, it may be sufficient to give a broad indication of the proportion of the proposal's trade draw likely to be derived from different centres and facilities in the catchment area and the likely consequences to the viability and vitality of existing town centres"*

2.28 The PPG also indicates that a judgement needs to be made as to whether the likely adverse impacts are significant based on local circumstances. Even very modest trade diversions from a new development may lead to a significant adverse impact. The design year for impact testing should be selected to represent the year when the proposal has achieved a 'mature' trading pattern (conventionally taken as the second full calendar year of trading after opening).

2.29 The assessments accord with the requirements set out in national planning guidance and local planning policy.

3 Other Retail Capacity and Impact Assessments

3.1 The relevant material from other recent retail capacity and impact assessments that have addressed the potential for new retail floorspace at Northstowe is described below.

Cambridge Sub-region Retail Study, GVA, October 2008

3.2 The GVA Grimley Retail Study 2008 was undertaken for Cambridge City and South Cambridgeshire District Councils to form part of the evidence base for the Councils' Local Development Frameworks (LDFs) and to inform future Development Plan Documents (DPDs).

3.3 It includes a detailed health check of shopping centres within Cambridge City and South Cambridgeshire, as well as an audit of out-of-centre convenience foodstores and comparison goods retail warehousing.

3.4 The Study provides a quantitative assessment of the potential for new convenience and comparison goods floorspace over the period to 2021. The quantitative assessment is informed by household interview surveys that identify existing shopping patterns within a very extensive Study Area reaching as far as March in the north, almost to Bury St Edmunds in the east, and to Letchworth Garden City and St Neots in the west.

3.5 Although five years old, the Study findings in respect of the existing performance of retail facilities in the Cambridge area remain relevant. Paragraphs 10.46-49 state:

> *"10.46 Our convenience goods assessment indicates that overall the foodstores in Cambridge City and South Cambridgeshire are performing well. In Cambridge City, in particular, some of the smaller convenience stores in the district and local centres have a strong level of performance compared with company average levels. Freestanding foodstores which are performing well include Waitrose, Trumpington and Sainsbury's, Coldham Lane. In South Cambridgeshire the store which is performing most strongly is Tesco Milton. Most of the smaller foodstores in the South Cambridgeshire rural centres are also performing well.*
>
> *10.47 The strong performance of convenience stores in the Cambridge sub region produces capacity to support further convenience goods floorspace. ………*
>
> *10.48 In terms of comparison goods Cambridge has an extremely good level of performance. ……..*

10.49 The strong performance of Cambridge for comparison goods creates significant residual capacity over the LDF period. ………

3.6 The Study comments on the Northstowe 2007 outline application proposals in paragraphs 11.24-36. In respect of retail capacity paragraph 11.25 says:

"Our capacity work indicates there will be sufficient capacity to support the food and non-food proposals at Northstowe provided they are phased as set out in the Retail Capacity and Impact Report (December 2007) see below. *In terms of convenience goods, the Northstowe proposals will, in conjunction with other pipeline schemes, remove the surplus capacity in 2021. The phasing of the proposals set out by DTZ indicates that not all of the convenience goods floorspace will be completed until 2024/2025 by which point there will be further expenditure growth to support the proposals."*

3.7 In respect of the trade impact of the Northstowe 2007 outline application proposals, the Study finds that the principal convenience goods impact will be on out-of-centre stores at Bar Hill and Milton. In respect of comparison goods Cambridge City is the only centre within the Cambridge area that will experience any material impact.

3.8 The Study recommends in paragraphs 12.9 and 12.15:

"We consider new larger convenience stores at East Cambridge district centre and Northstowe town centre, in conjunction with smaller scale provision elsewhere, would be sufficient to meet convenience shopping needs in the Cambridge sub region. We have tested the capacity for 3,000 sq.m net of convenience goods floorspace at East Cambridge and 5,525 sq.m net at Northstowe.

New centres at East Cambridge and Northstowe should contribute towards meeting any existing residents' comparison shopping needs arising, in addition to the needs of new residents. They could also accommodate some retail warehousing provision."

Cambridge Retail and Leisure Study Update, GVA, 2013

3.9 GVA was subsequently instructed by Cambridge City Council to undertake an Update of the Cambridge Sub-Region Study 2008. This was to provide a sound and robust evidence base for the City's emerging Local Plan covering the period up to 2031. Amongst other things, the Update was able to make comparisons with findings of the 2008 Study. Its findings are as follows.

3.10 In respect of overall performance the Study finds that for convenience shopping, the City Centre is still largely serving a top-up food shopping role, with the Sainsbury's and M&S on Sidney Street providing the main convenience goods provision in the Historic Core, and Little Waitrose the main provision in the Fitzroy/Burleigh Street area.

3.11 The network of out-of-centre foodstores (Sainsbury's at Coldhams Lane; Asda and M&S Simply Food at The Beehive; Tesco at Cheddars Lane; and Waitrose at Trumpington) are the dominant convenience shopping facilities, and overall GVA finds them to be trading well.

3.12 Cambridge City Centre continues to be the dominant comparison shopping destination in the area, reflecting its extensive comparison shopping offer split across the Historic Centre and Fitzroy/Burleigh area. GVA finds that since 2008, the Historic Core has continued to benefit from the opening of the Grand Arcade (as well as the Christ's Lane development), which has attracted a number of mid-high end operators. The Fitzroy-Burleigh area continues to perform a complementary role alongside the Historic Core, providing a more mainstream retail offer.

3.13 Despite the improvements in the City Centre's comparison retail offer, the updated survey evidence indicates a marginal decline in its market share from the Study Survey Area since 2008 (from 62% to 57%). Notwithstanding this, GVA notes that the City Centre continues to perform strongly.

3.14 Outside the city centre, retail warehousing provision in Cambridge also contributes to the comparison shopping offer. The retail parks provide for many of bulky goods needs of shoppers with a range of goods on offer. However there are also a number of more traditional high street names represented at The Beehive and Cambridge Retail Park (e.g. Boots, Argos, and Burton/Evans/Dorothy Perkins), which overlap to some extent with the City Centre's offer.

3.15 Overall the Study estimates that the City Centre and out-of-centre retail provision together retain around 80% of expenditure generated within the Study Survey Area, which clearly demonstrates Cambridge's prominence as a sub-regional retail destination.

3.16 The Study notes and makes some allowances for other centres planned in the wider sub-region including a new centre at Northstowe, and recommends that the City Council is involved in any discussions in respect of proposed new centres to ensure that the implications are properly assessed.

Northstowe Retail Capacity and Impact Report, DTZ, December 2007

3.17 The DTZ Retail Capacity and Impact and Report was prepared to support the 2007 Northstowe outline planning application. The application comprised approximately 9,500 dwellings plus other uses including 54,500 sq.m gross retail floorspace (Classes A1-A5) of which 49,500 sq.m gross was to be in the town centre. Class A1 retail floorspace proposed in the town centre was 8,500 sq.m gross convenience and 29,000 sq.m gross comparison goods. 5,000 sq.m gross retail floorspace was to be in the local centres.

3.18 The DTZ Study provides a comprehensive retail capacity assessment of the potential for new retail development within Northstowe, and an assessment and of the trade implications of the town centre proposals. A key input to the Study is household interview surveys undertaken to identify existing shopping patterns within a Northstowe defined Study Area, as well as street interview surveys within a diverse range of existing centres within the Study Area. The Study Area is extensive reaching as far as Cambridge, Ely and Huntingdon.

3.19 In addition to the quantitative assessments, the Study also includes a comprehensive qualitative appraisal of the role, function and retail offer of existing centres within the Study Area.

3.20 The assessments supporting the current planning application draw on material from the DTZ Study, updating it where appropriate. In particular a Study Area has been adopted that is derived from the DTZ Study Area sub-zones, which in turn enables use of the DTZ household survey information (based on the Study Area and sub-zones).

Local Centre Strategy and Retail Needs Assessment, Nathaniel Lichfield & Partners, February 2012

3.21 The 2007 Northstowe outline application had identified five local centres, of which four were to be of a neighbourhood scale with 300-500 sq.m gross floorspace including a local convenience store, newsagent and food / beverage retail. The other centre, implemented in advance of the town centre, was to be larger to serve the early residential and employment developments within the settlement.

3.22 The local centre strategy was modified by the Framework Masterplan Review which proposed two local centres only. The Nathaniel Lichfield & Partners (NLP) 2012 report commissioned by Gallagher provides an assessment of the strategy and retail needs for 'Local Centre A', which was to be constructed in advance of the town centre. It examines convenience and comparison goods needs focusing on the supermarket element.

3.23 The Study draws on the findings of both the GVA 2008 and DTZ 2007 Retail Studies, referred to above, in respect of existing shopping patterns in the area. Within a similar, but slightly smaller, catchment area than DTZ's Core Catchment Zone, the Study also provides a comprehensive list of local shopping facilities, including floorspaces and turnover estimates.

3.24 In paragraphs 8.8 and 8.9 NLP concludes:

> *"Our retail capacity assessment indicates that the proposed local centre could support a small supermarket with convenience goods floorspace between approximately 450 and 900 sq.m net by 2016, and between 650 and 1,300 sq.m net floorspace by 2021. The floorspace range is dependent upon whether the store is operated by a major retailer (e.g. Tesco or Sainsbury's) or a discount retailer (e.g. Lidl or Aldi); midmarket retailers (e.g. Co-Op or Budgens) would sit more centrally within this floorspace range.*
>
> *In addition, the local centre could support approximately 500 sq.m net of comparison goods floorspace by 2016, and approximately 850 sq.m by 2021, some of which would comprise comparison goods floorspace within the supermarket."*

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4 Existing Retail Centres and Facilities in the Area

4.1 In order to make informed judgements on the appropriate role and potential for a new town centre at Northstowe, it is necessary have an understanding of the hierarchy of existing shopping centres and facilities in the area.

4.2 Audits of existing retail facilities within the Cambridge area have been provided in the GVA Retail Study 2008 and GVA Retail Study Update 2013. In addition both the DTZ Retail Capacity and Impact Study 2007 and Nathaniel Lichfield & Partners Local Centres Study 2012 provide audits of centres within the Study Area. This material is drawn upon, updating it where appropriate. Within this report, dealing primarily with the floorspace capacity and commercial potential of a new town centre in Northstowe, the focus is on those centres / facilities that are closest to or likely to have the greatest synergy with Northstowe.

4.3 For the purposes of the Study quantitative assessment, a Study Area has been defined made up of three catchment zones – a Core Zone focussed on Northstowe and the surrounding villages, an extensive Secondary Zone surrounding the Core Zone (but excluding much of Cambridge City), and an Outer West Zone focussed on Huntingdon and Cambourne. The adopted Study Area has been subject of discussion and agreement with officers of South Cambridgeshire District Council. A plan of the Study Area and catchment zones is provided in Appendix A.

4.4 The relevant centres and facilities are described below, including reference to the draw of the centres and facilities from the catchment zones. Commitments and proposals in the centres are noted and set out in more detail in Appendix B.

Bar Hill

4.5 The dominant retail facilities in the Core Zone are at Bar Hill. The retail facilities are located on the edge of the Bar Hill residential areas, but with good access to the A14, to which it has a grade separated junction. Bar Hill does not have the benefit of any shopping designation within the Draft Local Plan. The retail facilities consist of:

- A large Tesco store retailing convenience and comparison goods, and having a gross floorspace of 15,215 sq.m and net floorspace of 9,392 sq.m. Approximately 3,800 sq.m of the sales floorspace is devoted to the sale of comparison goods, including stationery, health and beauty (with pharmacy), clothing and footwear, sportswear, entertainment, and electrical products;

- A row of seven units including Next and Choices. The Next store of 825 sq.m sales area is on two levels with ladies and menswear, as well as home products. Choices is a discount clothing store.

4.6 The Tesco store is of a size considerably in excess of that needed to serve Bar Hill residents alone (population approximately 4,000). It has good access to the A14 and operates akin to an out-of-centre facility, drawing large amounts of trade from settlements elsewhere. In particular it exerts a strong influence over shopping patterns in the Core Zone, attracting some 50% of Core Zone residents' convenience expenditure.

Core Zone Village facilities

4.7 Other than at Bar Hill, existing retail provision in the Core Zone is in the form of village centres. There are village facilities at Longstanton, Willingham, Over, Swavesey, Cottenham, Girton, and Histon / Impington. Typically facilities within the villages consist of a village store / sub post office / newsagent, plus, depending on their size, some other facilities (butcher, baker, hairdresser, cycle shop, etc.). Histon / Impington has a Tesco Express 422 sq.m gross, 202 sq.m sales area; and Co-op store 262 sq.m gross, 185 sq.m net).

4.8 Planning permission was granted in July 2011 for a convenience store of 279 sq.m gross plus four small retail/commercial units at Nelson's Crescent Longstanton. It is understood that a small Co-Op store is now proposed on the site.

4.9 The village centres perform an important role for their local communities and currently draw some 15% of Core Zone residents' convenience expenditure, a significant proportion of which is from 'top-up', rather than 'main' shopping trips.

4.10 Some impact on the village facilities is inevitable, particularly those closest to Northstowe. However, they are already competing against the close-by Tesco at Bar Hill, which is attracting a large proportion of main food shopping trips. Because of this any additional impact on nearby village centres will be less than it would otherwise be.

Tesco Milton

4.11 Tesco Milton is a freestanding store opened in 1989 close to the A10 / A14 junction some 13 kms to the south east of Northstowe, and therefore accessible to a wide catchment area on the north side of Cambridge. It has a gross floorspace of 4,578 sq.m and a sales area of 2,330 sq.m, of which approximately 650 sq.m of the latter is devoted to the sale of comparison goods.

4.12 The GVA 2008 Study noted that this store was trading strongly. 12% of Core Zone residents undertake their convenience shopping at Tesco Milton.

Cambridge City Centre

4.13 Cambridge City Centre is located some 12 kms to the south east of Northstowe and is a regional destination serving a wide catchment within East Anglia. 55% of Core Zone residents use Cambridge City Centre for their comparison goods shopping.

4.14 The shopping centre is in two parts – the historic centre focussed on Market Hill / Sidney Street / Petty Cury / St Andrew Street; and The Grafton Centre / Fitzroy Street / Burleigh Street area some 500 metres to the east.

Historic Centre

4.15 The principal shopping destination is the historic centre where, commensurate with the City Centre's status as a regional centre, there is a wide range of multiple as well as independent fashion traders. The prime frontages are in the Grand Arcade, Market St, Sidney Street and Petty Cury/Lion Yard.

4.16 The Grand Arcade is a major recent addition to the shopping offer of the City Centre, opened in 2007. It has been created by redevelopment of the former Robert Sayle (John Lewis) department store as well properties in the Lion Yard area to the rear. The scheme comprises some 41,800 sq.m gross floorspace of which the new larger John Lewis store comprises some 26,000 sq. m gross. Grand Arcade is multi-level and focussed on fashion retailing, including a wide range of quality clothing and footwear stores in addition to the new John Lewis store.

4.17 In addition to Grand Arcade, a smaller retail scheme has recently been opened at Christ's Lane on the opposite side of St Andrews Street to Grand Arcade. This has a floorspace of 7,282 sq.m gross and consists of a mix of retail and service uses.

Grafton Centre

4.18 The Grafton Centre / Fitzroy Street / Burleigh Street area lacks the character and appeal of the historic centre, and has more of a 'mid-market' focus. The Grafton Centre itself is a covered centre with the principal stores being Debenhams and Bhs. Other retailers include Boots, Next, Mothercare, Primark, and Topshop (Topshop and Topman are also present in the Grand Arcade).

4.19 Compared with the historic centre, the Grafton Centre / Fitzroy Street / Burleigh Street area, with its two multi-storey car parks, has better accessibility by car, particularly for residents of the north-west Cambridge area. The historic centre is much more dependent upon the park and ride system, which has become an increasingly important means of accessing the City Centre. There are two park and ride facilities on the north and west sides of the City at Milton and Madingley Road respectively.

4.20 Because of its mid-market offer and greater accessibility by car from the north-west, it is possible that the Grafton Centre / Fitzroy Street / Burleigh Street area could experience more competitive impact from a new town centre at Northstowe than would the historic centre of Cambridge. The historic centre has a distinctive and quality retail offer, as well as the ambience and attractive environment of the University City. It is unlikely that Northstowe town centre would provide a realistic alternative destination for many shopping trips to the historic centre.

Cambridge Non City Centre

4.21 The major foodstores in Cambridge City are in out-of-centre locations, the principal stores being - Asda, Coldhams Lane (3,790 sq.m total net floorspace 2,653 sq.m convenience sales area); Sainsbury Brooks Road (4,265 sq.m total net floorspace, 2,986 sq.m convenience sales area); and Tesco Cheddar Lane (4,081 sq.m total net floorspace, 2,653 sq.m convenience sales area). By virtue of their size these stores have a strong trade draw, particularly from within the City. However, being located in the eastern part of the City, they will not be particularly accessible to Northstowe residents.

The existing draw of the out-of-centre foodstores in Cambridge City from the Core Zone is very limited - less than 5%, but is stronger from the Secondary Zone at 20%.

4.22 Likewise the two major retail parks, Beehive Retail Park and Cambridge Retail Park on Newmarket Road, are both located in the eastern part of the city. Although these retail parks are not particularly accessible to residents living to the north-west of the City, some 18% of Core Zone residents' comparison expenditure is attracted to Cambridge 'out-of-centre' facilities, and it is likely that a significant proportion of this is to these two retail parks.

4.23 Both retail parks benefit from open Class A1 retail consents and, in addition to bulky goods traders, include retailers such as – Currys, PC World, Argos, Sports World, Burton/Dorothy Perkins/Evans, TK Maxx, Toys R Us, and JJB Sports.

4.24 In addition to the large foodstores mentioned above, there is a large out-of-centre Tesco foodstore at Cherry Hinton on the eastern edge of the City (5,574 sq.m gross 3,613 sq.m net floorspace), but outside the City administrative area. Being on the opposite side of the City, this store will not be very accessible to Northstowe residents.

4.25 There are local facilities only in north-west part of the City, but major residential expansion areas on the edge of this part of the City are proposed to be served by new local centres. These include two new foodstores of 2,000 sq.m net, on the NIAB site and within NW Action Area Sites respectively that have recently been granted planning permission (the latter granted reserved matters approval in December 2013 Ref: 13/1748/REM).

Huntingdon

4.26 Huntingdon is located some 22 kms to the north-west of Northstowe. It is a former County town with the shopping centre focussed on the pedestrianised High Street. It suffers strong competition from both Cambridge and Peterborough for comparison goods shopping. Within the Outer Zone West, within which Huntingdon is located, over 50% of comparison goods shopping trips are to Cambridge.

4.27 The town centre has been under some pressure, as is illustrated by the loss of M&S 'Simply Food' from High Street. However, major town centre retail redevelopment proposals are afoot at Chequers Court in the town centre. These proposals involve the relocation of Sainsbury from their current town centre site to an edge-of-centre location, and the introduction of new comparison goods facilities into the town centre. For the purposes of this Study it has been assumed that the Chequers Court will have been implemented by 2021.

4.28 The major existing out-of-centre facility is a Tesco superstore 9,407 sq.m gross, 4,852 sq.m sales area on northern edge of the town.

St Ives

4.29 St Ives is an historic market town some 12 kms to the north-west of Northstowe. Key retailers include an edge-of-centre Waitrose adjacent to the guided bus terminus, and Budgen in the town centre. Comparison multiple retailers in the town centre include

Boots, Mackays, New Look, and Stead and Simpson. In the northern residential areas of the town is a Co-Op foodstore of 2,601 sq.m gross,1,356 sq.m sales area.

4.30 The town centre is historic in character, contains a number of listed buildings, and provides an attractive environment for shoppers and visitors. The waterfront of the River Great Ouse is an added attraction of the town centre, although it is not directly visible from most of the shopping area.

4.31 The town centre shopping area is linear focussed on The Pavement / Market Hill, but with Bridge Street leading from the core area to the attractive River Great Ouse. Between The Pavement and Market Hill is an open area which provides a focal point for the centre, although much of it is currently used for car parking. In contrast some of the surrounding streets are narrow and more enclosed, e.g. Crown Street and Merryland, and provide small unit accommodation for more specialist shops and services.

4.32 Despite having a range of shopping facilities and retail services providing for the day-to-day convenience and comparison shopping needs of St Ives residents, the town currently experiences significant outflows of residents' expenditure, particularly to Bar Hill for convenience goods and to Cambridge for both convenience and comparison goods. It is also relevant to note that there will be easy access between St Ives and Northstowe, particularly by guided bus. There will therefore be the opportunity for cross flows of expenditure / trade between St Ives and Northstowe town centre.

4.33 A residential expansion area is planned to the west of the town, which is proposed to include a local centre with up to 400 sq.m gross retail area.

4.34 It is understood that Huntingdonshire District Council has recently resolved to grant planning permission for a large Morrison's foodstore (5,922 sq.m gross, 2,880 sq.m sales area) on the eastern edge of the town. This store has been treated as a commitment that will have been implemented by 2021 in this assessment. The new Morrisons store will enable St Ives to clawback trade currently lost to facilities elsewhere, particularly convenience goods shopping trips currently attracted to Tesco Bar Hill. This is allowed for in the assessment.

4.35 Other retail proposals under consideration in St Ives include small M&S and Tesco foodstores in out-of-centre locations on the eastern side of the town.

Cambourne

4.36 Cambourne is located some 22 kms to the south-west of Northstowe. Like Bar Hill, Cambourne is a planned new settlement. Ultimately it will have a population of approximately 10,000 persons. The principal shopping facility is a Morrison's foodstore with a gross floorspace of 5,922 sq.m and a sales area of 2,993 sq.m, of which approximately 360 sq.m of the latter is devoted to the sale of comparison goods. Planning permission has recently been granted for an increase in the sales area of the store to 3,200 sq.m. At present other shops and services in the town are limited, although there are proposals for additional facilities including Iceland, Home Bargains, and Just for Pets.

4.37 The Morrisons store is of a size to attract shopping trips from beyond Cambourne settlement. This is principally from the Huntingdonshire area. Only 3% of Core Zone residents use Cambourne for their convenience shopping, because of the intervening opportunity of Bar Hill.

Ely

4.38 Ely is located some 27 kms to the north-east of Northstowe. It has an attractive and compact town centre, which includes the Cloisters Shopping Centre opened in 1997. The Cloisters Centre includes a Waitrose foodstore plus 20 unit shops.

4.39 There is a large out-of-centre Tesco (4,824sq.m gross) on the A142 by-pass, as well as a more recently opened large out-of-centre Sainsbury store at Lisle Lane of 8,503 sq.m gross, 4,214 sq.m sales area.

4.40 Ely draws only a small amount of trade from the Study Area, and because of its distance from Northstowe is not considered further in this assessment.

5 Town Centre Proposals

Northstowe Development Framework Document, August 2012

5.1 In Section 2 the planning requirements set out in the NAAP 2007 are described for a new town centre at Northstowe, which is to be close to the geographical centre of the settlement and on the dedicated guided busway route through the town.

5.2 The NAAP has been supplemented by the Northstowe Development Framework Document, August 2012 (DFD) prepared by Gallagher and the HCA. The was prepared with the involvement of South Cambridgeshire District and Cambridgeshire County Councils and provides an updated master-plan for Northstowe showing a phased approach to the delivery of new homes, employment, community facilities and infrastructure in the new settlement.

5.3 The DFD identifies the town centre located centrally in the settlement and two local centres in the north and south of the settlement respectively. The form of the town centre is described in Section 5:

> *"The town centre has been laid out as a traditional linear street, similar to that at St Ives. A key difference however is that vehicular traffic is rerouted around the town centre. While this will encourage travel to the town centre by bus, cycle or foot, some car parking accessed via the primary streets will be located close to the shops and social amenities. The principal civic buildings will be located within the town centre and could include a place of worship, library or town hall. A regular town market will be a defining feature, as will the town park, visible from and adjacent to the dedicated busway. A tight urban grain is proposed, with a distinct increase in building heights, density and apartment housing. An integrated mix of retail, civic, employment, residential and educational land uses will maximize the potential to realise an active and vibrant town centre."*

A Town Centre Concept

5.4 It has been indicated in the Introduction that although the application scheme is for Phase 2 of the new settlement at Northstowe only, the town centre proposals that form part of the application are to be laid out and phased so as to have the potential to serve the settlement as a whole once completed. The Phase 2 application includes 3,500 homes, although including the Phase 1. 1,500 homes already committed, plus subsequent phases of development, the town centre is proposed to serve the needs of residents occupying some 10,000 new homes.

5.5 Although the planning framework for a new town centre (and local centres) has already been established by planning policy and the DFD, its more detailed scale and form is to be determined through this Phase 2 application.

5.6 This report is one of a suite of documents that support the Phase 2 application, including a Northstowe Town Centre Strategy prepared by the HCA and Northstowe Economic Development Strategy prepared for the HCA by genecon. These documents set out the guiding principles that underlie the proposals for the town centre. These include:

- a 'town centre' that will be the defining feature of Northstowe;
- the inclusion within the town centre of a wide range of local services, residential, and employment uses, as well as retail which is subject of examination in this particular report; and
- exploitation of the opportunities offered by the guided busway running through the town centre.

5.7 The town centre concept and scheme described below is based up the guiding principles that have been defined in the Town Centre Strategy and Economic Development Strategy. The town centre is to make provision for a range of shops, services, cultural, leisure, entertainment and community facilities that will serve the needs of Northstowe and the immediately surrounding area, without undermining the vitality and viability of nearby village centres and market towns or compete with Cambridge. The principal centres / facilities in the surrounding area have been described in Section 4.

5.8 In bringing forward proposals, the appropriate format for the town centre and its various constituent parts has been considered. This has been informed by benchmarking UK town centre schemes and through consideration of best practice from the UK's high streets of a similar nature. The views of the specialist retail consultants Kitchen La Frenais Morgan (KLM) have also been sought in respect of current retail trends and occupier requirements, with particular reference to potential in smaller town centres such as is planned for Northstowe.

5.9 Town centres across the UK are currently facing a period of challenging and rapid change and in some cases, they are having to face up to a reduced requirement for retail floorspace as out-of-centre retail parks and internet purchases draw footfall away from the traditional high street.

5.10 This recent trend has generated a wealth of analysis and thought leadership on 'what makes a successful high street', and the development of Northstowe's town centre comes at a point where the benefits of this knowledge can be put to good use.

5.11 A review has been undertaken of the various components of a successful town centre, having regard to the intended role and function of Northstowe town centre. With the possible exception of food trading, there is no fixed relationship between the number of housing units developed within an area and the amount of retail, service and office employment floorspace that can be supported. Determining factors are the role and function of the new centre within the overall hierarchy of centres within the area, planning policy, and the response of the market to opportunities.

5.12 In this case particular consideration has also been given to the role and function of the new town centre in relation to the substantial existing retail facilities at Bar Hill (principally a very large Tesco store), which will continue to be highly accessible to Northstowe residents.

5.13 Having regard to these considerations, including the overall strategy for the town centre as set out in NAAP 2007, the planning application brings forward proposals which consist of a predominantly open linear centre focussed on the route of the guided busway route. The proposed centre makes provision for a mix of uses including:

- medium sized foodstores;
- convenience and comparison goods retail shops (defined in section 7);
- an outdoor market;
- retail services, e.g. hairdressers, beauty salons, etc;
- restaurant / café and related food and drink services;
- employment and financial services, e.g. banks, building societies, estate agents, etc;
- leisure / health facilities, e.g. fitness centre;
- civic and community uses, e.g. library, places of worship;
- residential; and
- An attractive public realm focussed on the 'High Street' and 'Town Square';

5.14 The form and layout of the town centre responds to the following needs:

- Creation of a town centre which is attractive and which will meet the shopping and other needs of Northstowe residents - accepting that Cambridge City will remain the predominant destination for most higher order quality / fashion comparison goods purchases;
- Maximum accessibility by all forms of transport, in particular the guided bus;
- Creation of shopper destination points and active frontages which will encourage footfall through the centre; the location of foodstores and other shops within the centre is important in this respect.

The Application Scheme

5.15 Table 5.1 below sets out the 'main town centre uses' (NPPF defined) comprised within the planning application proposals for Northstowe town centre. The Table also indicates the proposed phasing.

Table 5.1 Town Centre Floorspace (main town centre uses)

	Phase 1. 2021 sq.m gross	**Phase 2. 2031 sq.m gross (inc Phase 1)**
Class A1 Convenience	6,500	10,000
Class A1 Comparison / Services	10,000	25,000
Class A3 Food and Drink	1,700	3,500
Class B1 Office	2,700	16,200
Leisure	2,000	10,000
Community Facilities	8,000	9,000

Floorspace figures are cumulative (should not be added together)

5.16 The retail floorspace figures are based on requirements identified up to 2031. It can be seen from Appendix C Tables 2b and 3b that some 3,535 dwelling completions are programmed post 2031. This is too long a time period over which to make any meaningful quantitative assessments. It is also too far into the future for the market to be much influenced by at the present time. However, the likely scale of housing completions post 2031 does indicate that there needs to be space within the town centre where further expansion could take place in the future. The master-plan for the town centre has regard to this.

5.17 The Class A1 convenience floorspace proposed of 6,500 sq.m gross allows for the delivery of two principal foodstores in Phase 1 – a premium foodstore of around 4,500 sq.m gross and a discount store of around 1,500 sq.m gross. These stores aim at different market sectors and are used to trading alongside one another.

5.18 Additional convenience floorspace of some 3,500 sq.m gross is proposed in the period 2021-31, the predominant component of which is likely to be a further foodstore. The overall convenience floorspace figures also allow for small units shops selling convenience goods - bakers, fresh fruit and vegetables, health foods, etc. Although not included within built floorspace figures, provision is made for an outdoor market area within which the sale of fresh produce would be a particular attraction of the town centre.

5.19 Unlike in very large foodstores, as at Tesco Bar Hill, a limited amount only of comparison goods floorspace will be located in the foodstores in the town centre. The comparison goods floorspace figures proposed of 10,000 sq.m gross by 2021 and 25,000 sq.m gross by 2031 assume provision in unit shops of varying sizes catering for the needs of both multiple and independent traders. They also include an allowance for Class A1 service trades, hairdressers, beauty salons, etc.

5.20 A significant amount of non-Class A1 retail floorspace is proposed, including Class A3 food and drink facilities, leisure, civic and community, and small unit office / studio uses, as well as residential development. These will assist in generating footfall and spend within the town centre. Provision of these facilities will also assist in providing a lively town centre, particularly out of normal shopping hours. This accords with the strategy to provide a diverse town centre serving the wider needs of residents as set out in the NAAP 2007. It also assists in differentiating the offer of the town centre from that in Bar Hill, which is very much focussed on large unit retailing, and will enable the town centre to compete more effectively with Bar Hill.

6 Sequential Approach

6.1 'Sequential approach' requirements as set out in the NPPF 2012 and PPG 2014 have been described in Section 2. Paragraph 24 of the NPPF states:

"Local planning authorities should apply a sequential test to planning applications for main town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan. They should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge of centre and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale."

6.2 The South Cambridgeshire Core Strategy 2007 makes provision for new retail convenience and comparison floorspace in Northstowe of a scale *"which ensures that the settlement is sustainable".*

6.3 The Northstowe AAP 2007 makes specific provision for a 'town centre' in Northstowe. The objectives for the town centre are set out under the heading 'D1 The Town Centre' Policy NS/5 sets out policies for the location and form of the town centre, including the need for submission of 'Town Centre Strategy' as part of the application for initial planning permission. A Town Centre Strategy is submitted with this application as a separate supporting document. Policy NS/5 also requires that the range of shops, services, cultural, leisure, and entertainment and community facilities provided *"has regard to the sequential test"*.

6.4 The South Cambridgeshire Submission Local Plan 2014 has reached an advanced of preparation and significant weight can therefore be attached to it. It has been subject of consultation and was submitted to the Secretary of State for examination in March 2014. Policy E/21 makes provision for a retail hierarchy within the District with Northstowe (and Waterbeach) being defined as 'town centres'.

6.5 The South Cambridgeshire Core Strategy, Northstowe AAP, and South Cambridgeshire Submission Local Plan demonstrate that in planning policy terms the new centre for Northstowe is defined as a 'town centre', and therefore benefits as a first priority location for new retail development and for other 'main town centre uses'.

6.6 Other main town centre uses are defined in Annex 2 Glossary of the NPPF:

*"Main town centre uses**:** Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-*

clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

6.7 The scale and form of the planning application proposals for Northstowe town centre are consistent with the proposals for a town centre in Northstowe that set out in the South Cambridgeshire Core Strategy, Northstowe AAP, and South Cambridgeshire Local Plan that Northstowe town centre. The requirements of the sequential approach are therefore met.

6.8 In any event there are no alternative sites that are higher priority locations in terms of the sequential approach for the retail and other main town centre uses proposed. In the following sections it is demonstrated that the scale and type of development described in Section 5, for which planning permission is sought, will not have a significant adverse impact on any existing centres, including Cambridge.

7 Study Area Population and Retail Expenditure Forecasts

The Study Area and Catchment Zones

7.1 For the purposes assessing retail capacity and trade impacts it is necessary to define the potential catchment area of the new town centre. Its catchment area will be a function of:

- The size and retail offer of the new town centre;
- Accessibility to the surrounding area;
- Competing shopping centres.

7.2 The above considerations were examined in some detail by DTZ, when formulating a Study Area and catchment zones as part of their retail assessment of the 2007 Northstowe outline application proposals. The justification for the DTZ Study Area and catchment zones that are set out in Section 3 of their Report has been examined. With the exception of the Outer East Zone focussed on Ely, the DTZ zones provide the most appropriate basis for a re-assessment in this Study of Northstowe town centre floorspace potential and trade impacts. The DTZ household interview surveys indicate that Ely attracts very few shopping trips from the remainder of the Study Area and it has therefore been omitted.

7.3 The Study Area for this assessment therefore consists of a Core Zone, Secondary Zone, and Outer West Zone, which are shown in plan form plan form in Appendix A. The zones are based upon local authority wards. The constituent wards of each zone are provided in Appendix C Table 1. The Core Zone includes Northstowe and the immediately surrounding rural area from which the town centre would draw trade. Other than the major shopping facilities at Bar Hill just to the south of Northstowe, the Core Zone is currently served by village shops only (see Section 5).

7.4 The Secondary Zone includes a broad area to the north, east, and south of the Core Zone. It lies wholly to the north and west of Cambridge, and includes some of the northern areas of Cambridge City. It does not extend to the south of the Cambridge urban area where there is major development, for example in the Trumpington area. Northstowe town centre is unlikely to draw material amounts of trade from the opposite side of the City. The only urban areas within the Secondary Zone are the northern part of Cambridge City and St Ives to the west.

7.5 The Outer West Zone has been included because a new town centre at Northstowe might be expected to draw some trade from this zone. However, it is more distant from Northstowe and includes Huntingdon and Cambourne, the former in particular being a strong centre within this catchment zone.

Forecast Dates

7.6 The base year of this Study is 2013, with forecasts provided for 2021 and 2031, at which dates the impacts of Phase 1 and Phase 2 of the town centre proposals are tested (for details of the retail content of the town centre scheme see Section 10) It has been noted that Northstowe settlement will be implemented over a longer period than this. However, retail capacity studies rely upon data inputs and related assumptions which become increasingly tenuous and unreliable over time as circumstances change. Similarly in making investment decisions the market will have limited regard to circumstances over a longer time period than this.

Population Forecasts

7.7 Base population figures (2013) for the Study Area and catchment zones were obtained from Experian Micromarketer in November 2013, together with projections to the end of the study period 2031. The Experian figures show a 2013 base year population for the Core Zone of 40,581 persons, which by 2031 is forecast to grow to 48,898 persons (a growth of some 8,317 persons).

7.8 The Experian forecasts are based on ONS population projections that do not make explicit allowance for Northstowe. In order to make allowance for Northstowe, regard has been had to the forecasts of new housing completions set out in the Submission Local Plan. Within the Local Plan, Figure 3 Housing Trajectory provides housing completion forecasts for all development sites in the District (as well as making an allowance for windfall sites). The completion forecasts for the period 2013-31 for the principal identified sites that lie within the Core Zone are:

- Northstowe – 5,965 dwellings;
- Land within the North West Cambridge Area Action Plan Area – 1,155 dwellings;
- Land between Huntingdon Road and Histon Road - 900 dwellings;
- Orchard Park - 253 dwellings;
- Land north of Impington Lane – 56 dwellings;
- Villa Road Impington - 72 dwellings;
- Land at Cottenham - 47 dwellings;
- Land at Willingham – 50 dwellings.

7.9 Excluding Northstowe (5,965 dwellings), housing completions at these Core Zone sites total some 2,533 in the period 2013-2031. With an average household size of 2.45 persons, this is the equivalent of some 6,205 additional persons in 2031; some 2,102 persons below the Experian ONS based forecast growth of 8,317 persons. However, the above Core Zone dwelling completions do not include some allowances in the housing trajectory that are not site-specific. The major non-site specific allowance is for 'windfall' sites for which an allowance of 2,900 dwelling completions is made within the whole of South Cambridgeshire District for the period 2013-2031. In addition there are non-site specific allowances for historic planning permissions and small sites under construction.

7.10 If allowance is made for the additional population arising from 'windfall' and other non-site specific sites, the overall housing completion forecasts for the Core Zone (excluding Northstowe) are likely to be broadly consistent with the Experian ONS based population forecasts for the Core Zone. The Local Plan forecast dwelling completions for Northstowe have therefore been added to the Experian ONS based forecasts for the period 2013-2031. This is consistent with the approach that was adopted by DTZ in their 2007 Study. The population forecasts covering the period 2013-2031 are shown in Appendix B Tables 2a and 3a and summarised in Table 7.1 below.

7.11 The population forecasts show a growth of 22,931 persons in the Core Zone in the period 2013-2031 - a substantial increase of some 57%. The Study Area as a whole experiences a growth of 48,739 persons over the same period - an increase of some 24%.

Table 7.1 Study Area and Catchment Zone Population Forecasts

	2013	2021	2026	2031
Core Zone	40,581	49,656	56,775	63,512
CZ Cumulative Growth	0	+9,075	+16,194	+22,931
Secondary Zone	107,528	113,018	117,023	120,985
Outer West Zone	56,848	62,992	66,373	69,199
Study Area	204,957	225,666	240,171	253,696
SA Cumulative Growth	0	+20,709	+35,214	+48,739

7.12 The Northstowe component of the forecasts is set out in Appendix B Tables 2b and 3b. It has been noted above that the forecasts show 5,965 dwellings being completed at Northstowe in the period 2013-2031, with the remaining dwellings being completed post 2031.

Available Retail Expenditure

7.13 As with population, available retail expenditure was forecast for the forecast years based on information obtained from Experian Micromarketer in November 2013, for the Study Area and catchment zones. Expenditure per head is divided into convenience and comparison goods based on Experian definitions. Convenience goods are everyday items that customers are unlikely to travel far to purchase and include food and non-alcoholic drinks, tobacco, alcohol, newspapers and 90% of non-durable household goods. Comparison goods are all other retail goods.

7.14 The base year expenditure figures are at 2011 in 2011 prices. The base year expenditure figures are then projected to 2013 and the forecast years to 2031, using Experian national 'Forecast' growth rates from Experian Retail Planner Briefing Note 11, October 2013.

7.15 For the period 2011-2014, reflecting the current recession, convenience goods expenditure per head actually declines and the figure does not achieve its 2011 level again until 2016. From 2016 onwards a convenience goods growth rate of 0.8% per annum has been used throughout the forecast period.

7.16 The comparison goods growth rate is likewise affected by the recession, although because the growth rate is higher than that for convenience goods, it is depleted in the period immediately post 2011, but does not experience actual decline. Over the period post 2015, the growth rate is around 3% per annum, which is relatively modest compared with average rates achieved over the last 20-30 years, prior to the current recession. The more modest forecast rates reflect a concern over the future shape of the economy and its impact on disposable incomes.

7.17 The expenditure per head forecasts are converted to forecasts of available expenditure within the Study Area and catchment zones by multiplying the population figures by the figures of expenditure per head. The expenditure forecasts are shown in Appendix C Tables 2a and 3a for convenience and comparison goods respectively and are summarised in Tables 7.2 and 7.3 below.

Table 7.2 Study Area and Catchment Zone Convenience Goods Expenditure Forecasts (including Special Forms of Trading)

	2013	2021	2031
Core Zone	£81.11m	£103.9m	£143.92m
CZ Cumulative Growth	0	£22.79m	£62.81m
Secondary Zone	£199.20m	£219.19m	£254.10m
Outer West Zone	£106.55m	£123.6m	£147.04m
Study Area	£386.87m	£446.69m	£545.06m
SA Cumulative Growth	0	£59.82m	£158.19m

Table 7.3 Study Area and Catchment Zone Comparison Goods Expenditure Forecasts (including Special Forms of Trading)

	2013	2021	2031
Core Zone	£149.96m	£229.97m	£391.47m
CZ Cumulative Growth	0	£80.01m	£241.51m
Secondary Zone	£361.88m	£476.69m	£679.16m
Outer West Zone	£195.67m	£271.74m	£397.30
Study Area	£707.50m	£978.39m	£1,476.93m
SA Cumulative Growth	0	£270.89m	£769.43m

7.18 It should be noted that the expenditure figures in Tables 7.2 and 7.3 relate to all retail expenditure, without at this stage having made any deduction for expenditure not transacted on shop floorspace – Special Forms of Trading (SFT). SFT is principally expenditure through the internet, but also through markets, catalogues, vending machines and door to door sales. It also includes expenditure in farm shops, which may be relevant in some parts of the Study Area. Experian provides forecasts of deductions to be made for SFT within Briefing Note 11. It is to be noted that goods that are ordered online and collected or delivered from physical stores are not included as SFT, as the transaction goes through shop tills. This is an increasing popular method of food shopping. Operations such as Ocado and use of 'dark' stores and warehouses with no access to the public are included as SFT. Deductions have been made for growing levels of SFT when considering expenditure flows within each catchment zone to shopping centres and facilities (Section 8).

7.19 Within the Core Zone, from which the majority of the town's convenience goods expenditure would be drawn, available convenience goods expenditure grows by approximately £63m by 2031. Even allowing for SFT and expenditure attracted to other outlets within and outside the Core Zone, this is a substantial amount of expenditure. Typically a superstore might be expected to achieve a convenience goods turnover of £25m to £30m (although the very large Tesco at Bar Hill achieves a significantly higher turnover than this).

7.20 Although the growth of convenience goods expenditure within the Study Area as a whole is much larger at approximately £158m, the majority of this expenditure will be attracted to outlets within other established towns and centres outside the Core Zone.

7.21 Because with increasing affluence residents spend an increasing proportion of their disposable income on comparison goods as opposed to convenience goods, the growth of comparison goods expenditure is much faster. In addition, with increasing affluence and mobility an increasing proportion of comparison goods expenditure is attracted to larger shopping centres and facilities which are able to provide a broader based and more attractive shopping offer. In the case of Northstowe and the Study Area as a whole, the principal shopping destination for comparison goods is Cambridge City Centre. This is the centre to which the majority of available comparison goods expenditure will be drawn. Furthermore, as noted in Section 2, this is supported by planning policy, which requires that new shopping facilities at Northstowe should not have a significant impact on the role of Cambridge.

7.22 In Section 11, the likely take (market share) of Northstowe town centre from the pool of available comparison goods expenditure is examined, having regard to both commercial market and planning policy considerations.

8 Existing Shopping Patterns within the Study Area

DTZ Household Interview Surveys

8.1 In order to understand existing shopping patterns within the Study Area and catchment zones, DTZ commissioned household interview surveys that were carried out by Research and Marketing in November 2006. 1,650 telephone interviews were undertaken across the Study Area zones, with the analysis of the responses subsequently weighted according to the population of the constituent zones. The outputs of the survey enabled the shopping destinations of residents' from each zone for different types of shopping trip to be identified.

8.2 We have used the DTZ Interview Survey findings at 2006 to establish likely shopping patterns at 2013 (the base year of the current assessment). However, the findings have been updated to allow for changes since 2006 that are likely to have affected shopping patterns. The principal changes are:

- An increase in SFT based on the latest Experian forecasts referred to in Section 4;
- The opening of the Grand Arcade shopping centre in Cambridge City Centre in 2007 with some 41,800 sq.m gross floorspace, and anchored by a new John Lewis store of some 26,000 sq. m gross.

8.3 This approach has been discussed and agreed with officers of South Cambridgeshire District Council.

Centre / Facility Market Shares

8.4 The percentage market shares of available zone convenience and comparison goods expenditure attracted to shopping centres/facilities at the base date 2013 are summarised below in Tables 8.1 and 8.2. These are taken from Tables 4a and 5a of Appendix C. An allowance for Special Forms of Trading (SFT), see Section 7, is shown at the foot of the Tables.

Convenience Goods

8.5 Within the Core Zone Bar Hill is dominant attracting some 50% of convenience goods shopping trips. The other large foodstore destination is Milton, attracting some 12% of trips. It should be noted that although the survey findings for Bar Hill and Milton include some additional facilities, both of these destinations are dominated by the respective Tesco foodstores. The Core Zone Village Centres, principally at Cottenham, Willingham and Histon, are estimated to attract 15% of trips. Having regard to the type of facilities available in the Village Centres, these will generally be of a less bulky nature.

8.6 Within the Secondary Zone, food shopping destinations are more widespread with the principal destinations being Bar Hill approximately 16%; Cambridge Out of Centre 20%; Milton (Tesco) 15%; and other locations 22% (principally Ely). It should be noted that Cambridge 'Out-of-Centre' refers to facilities outside the City Centre and will include defined local centres as well as out-of-centre facilities.

8.7 Within the Outer West Zone Huntingdon is the principal destination attracting 43% of convenience shopping expenditure, but there is strong competition from Cambourne attracting 25%, as well as Bar Hill attracting 11%.

8.8 SFT is estimated as 2.5%. It is important to note that for convenience goods shopping, although there is increasing use of the internet, the majority of these purchases are taken from the sales floorspace of local stores before being delivered to customers homes. These internet purchases do not therefore lead to a direct reduction of sales floorspace requirements and are not therefore included as an SFT deduction.

8.9 The overall leakage of convenience goods expenditure from the Core Zone to centres / facilities outside the Zone is around 35%.

Table 8.1 Convenience Goods Shopping Patterns (Market Shares) 2013

	Core Zone	**Secondary Zone**	**Outer West Zone**
Bar Hill	50.5%	15.5%	11%
Core Zone Villages	15%	0%	0%
Milton	12%	15%	0%
Cambridge	7%	26%	1%
St Ives	3%	9%	9%
Cambourne	3%	3%	25%
Huntingdon	1	7%	43.5%
SFT	2.5%	2.5%	2.5%

Comparison Goods

8.10 The percentage market shares of available zone comparison goods expenditure attracted to shopping centres/facilities at the base date 2013 are summarised below in Table 8.2. The comparison goods market shares are made up of a variety of categories of comparison goods, but it is normal practice to combine them into a single category to illustrate shopping patterns in an area. As is to be expected the interview surveys show markedly different shopping patterns for convenience and comparison shopping.

Table 8.2 Comparison Goods Shopping Patterns (Market Shares) 2013

	Core Zone	Secondary Zone	Outer West Zone
Bar Hill	8.2%	3%	3%
Core Zone Villages	1%	0%	0%
Milton	0%	1%	0%
Cambridge	70%	70%	53%
St Ives	2%	3.5%	6%
Cambourne	0%	0%	1%
Huntingdon	1%	4%	23%
SFT	10.8%	10.8%	10.8%

8.11 Appendix C Table 5a shows that within the Core Zone Cambridge City Centre and Out of Centre facilities dominate, attracting 70% of shopping trips. The majority of this (52%) is to the City Centre. Bar Hill is the second most popular destination attracting approximately 8% of shopping trips.

8.12 Similarly Cambridge is the dominant centre for Secondary Zone residents attracting 70% of all shopping trips. St Ives, Bar Hill and Huntingdon each attract less than 5% of trips.

8.13 Even within the Outer West Zone focused on Huntingdon, Cambridge attracts 53% of shopping trips, with Huntingdon and St Ives attracting only 23% and 6% respectively. This is a clear indication of the strong sub-regional role that Cambridge is playing over a wide area for comparison goods shopping.

8.14 Although in the period between their two Retail Studies in 2008 and 2013, GVA found that the market share of comparison goods expenditure attracted by Cambridge City Centre from GVA's core catchment area for the City had declined slightly, it has been felt prudent and realistic to assume that within the Northstowe Study Area used in this assessment Cambridge will maintain its strong draw for comparison goods shopping trips.

8.15 SFT is significantly higher for comparison goods representing just under 11% of residents' expenditure.

8.16 The overall leakage of comparison expenditure from the Core Zone to centres / facilities outside the Zone is very high at over 90%.

9 Existing Retail Expenditure Capacity

9.1 It is common practice in assessments of this nature to consider whether there is expenditure capacity at the base date justifying new floorspace, i.e. to assess whether there is an existing deficiency of retail provision within the catchment. It has been noted above, for example, that the GVA Retail Study 2008 and Study Update 2013 found that both convenience and comparison goods shops in the Cambridge area were trading well at the base date of their study. This also appears currently to be the case from some of the findings of this Study.

9.2 The turnover performance of existing centres / facilities, can be assessed by multiplying the percentage market share figures of expenditure attracted to existing centres / facilities identified in Section 8 and Appendix C tables 4a and 5a by the figures of available Zone expenditure set out in Tables 2a and 3a. The resulting turnover figures are shown in Table 4b for convenience goods and 5b for comparison goods. It is important to note, however, that the figures represent turnover drawn from residents within the Study Area only, and do not include turnover attracted from elsewhere. This is of particular significance in respect of Cambridge, which plainly has a much wider catchment than the Study Area used in this assessment.

Existing Foodstores Turnover Performance

9.3 In Section 3 the findings of the GVA Retail Study 2008 and Study Update 2013 have been described, which found that foodstores in Cambridge City and South Cambridgeshire were performing well overall. Tesco Milton was performing most strongly, and most of the smaller foodstores in South Cambridgeshire were trading well.

9.4 The two principal large foodstores closest to Northstowe are Tesco Bar Hill and Tesco Milton. Tesco Bar Hill appears to be trading strongly. Based on company average sales densities, its ‘benchmark’ convenience goods turnover can be assessed as being around £70m. This compares with an ‘actual’ turnover of £83.56m (Table 4b) a performance uplift of some 20% (not having including any additional turnover drawn from outside the Study Area). It is possible that the interview survey responses have exaggerated somewhat the turnover of this large store. This can happen where respondents provide a one centre answer, when in fact they use more than one facility for a particular type of shopping. Even so there can be no doubt that the Bar Hill Tesco store is attracting large amounts of turnover and trading strongly.

9.5 Although significantly smaller than the Bar Hill store, Tesco Milton is also trading strongly, as was also found to be the case in the GVA 2008 Study findings.

Existing Comparison Goods Centre Turnover Performance

9.6 Because the principal comparison goods facilities in the area are in Cambridge City, and the City has a far wider catchment than the Study Area defined in this Assessment for Northstowe, the turnover figures in Table 5b cannot be used to judge the performance of centres in Cambridge City. However, evidence on the performance of Cambridge centres is provided in the GVA Retail Study 2008 and Update Study 2013. Both found that the City Centre and non-City Centre facilities were trading well. Somewhat surprisingly the City Centre market share from the GVA Survey Area was found not to have increased since opening of the Grand Arcade scheme. Even so GVA found the City Centre to be trading well and successfully fulfilling its role as a sub-regional shopping centre.

Approach

9.7 Despite evidence above of strong trading within some centres, regard has been had in this assessment only to the potential that will arise in the future as a result of population and expenditure growth. The principal consideration addressed in this assessment is the retail floorspace potential that will be generated by the new resident population of a newly established settlement at Northstowe, and the assessment does not therefore propose any new floorspace at Northstowe on the basis of unmet expenditure potential at the base date.

9.8 Existing retail provision in the principal catchment area of Northstowe, the Core Zone, consists of the large Tesco foodstore at Bar Hill and village shops. Tesco Bar Hill is very large, has good accessibility direct onto the A14, and plainly draws trade from a much wider catchment area than the Core Zone alone. It is not therefore considered to be appropriate to propose new floorspace in the Core Zone on the basis of any 'overtrading' at Tesco Bar Hill.

9.9 Both the Secondary and Outer Zones are served by established shopping centres, e.g. at Huntingdon, St Ives and Cambourne. In the event that there is any under-provision of retail floorspace at the base date within these zones, the first priority should be to provide for it within centres within these zones.

9.10 Based upon the above considerations, this assessment examines new floorspace potential based upon the expenditure growth that will arise as the new settlement is implemented, focussing in particular on the position at 2021 and 2031.

10 Northstowe Town Centre Retail Turnover Estimates

10.1 The Class A1 retail floorspace for which planning permission is sought has been identified in Section 5. For the purposes of assessing retail trade impact, the assumed floorspace make-up of the town centre proposals is set out in further detail in Appendix C Table 6. This shows the type of floorspace envisaged and provides estimates of sales floorspace areas, from which turnover estimates are made.

10.2 For the avoidance of doubt, it is confirmed that there are no specific retailers associated with the proposals at his stage.

10.3 Floorspace sales areas have been estimated from gross floorspace areas based on the trading formats of different types of retailing, e.g. food supermarkets, unit shops, etc. Sales density (turnover per sq.m) estimates for each type of floorspace have been made based upon company average figures from published sources (Mintel Retail Rankings 2013 and Verdict on Grocers 2013) where known, or otherwise are Deloitte estimates. The sales density estimates have been allowed to grow throughout the forecast period in accordance with research forecasts set out in Experian Planner Briefing Note 11 (October 2013).

10.4 The floorspace and turnover estimates are summarised Table 10.1 below.

Table 10.1 Town Centre Floorspace and Turnover Estimates

	Gross Floorspace sq.m	**Sales Floorspace sq.m**	**Turnover 2021 (Phase 1) £m**	**Turnover 2031 (Phases 1 & 2) £m**
Convenience Goods	6,500	3,600	£45.93	£46.39m
Comparison Goods	10,000	8,625	£47.14	£57.46
Phase 1 Total	**16,500**	**12,225**	**£93.07**	**£103.85**
Convenience Goods	3,500	1,845		£17.04
Comparison Goods	15,000	11,880		£76.03
Phase 2 Total	**18,500**	**13,725**		**£93.07**
Scheme Total (Phases 1 & 2)	**35,000**	**25,950**		**£196.92**

11 Retail Expenditure Capacity Forecasts

Methodology

11.1 Quantitative forecasts of retail expenditure capacity arising from the town centre retail proposals at 2021 and 2031 have been undertaken. These assume that the first two stages of the town centre proposals (Phases 1 and Phase 2) will have been implemented by these dates.

11.2 The methodology used for the forecasts is the same as has been used for assessing shopping patterns at the base year (2013) described above. For each forecast year, available convenience and comparison goods expenditure within the Core Zone, Secondary Zone and Outer West Zone has been identified. For each Zone, market shares of expenditure attracted to shopping centres / facilities have been applied, so enabling the turnover (derived from within the Study Area) to be identified for each shopping centre / facility. The outputs are shown in Appendix C Tables 7a and 8a for convenience goods and 10a and 11a for comparison goods.

11.3 Where appropriate, the market share figures have been adjusted from those applying at the base year. For each forecast year SFT has been increased in accordance with the most recent Experian forecasts (Experian Retail Planner Briefing Note 11, October 2013). Allowance has also been made for shopping commitments / proposals that are likely to affect shopping patterns. The principal commitments / proposals are as follows:

- North-west Cambridge – provision of two local centres to serve residential expansion areas on the north-west edge of Cambridge;
- Planning permission for a small Co-op foodstore at Longstanton;
- Huntingdon – redevelopment of the Chequers Court area in the town centre to provide additional comparison goods floorspace, and the relocation of Sainsbury from the Chequers Court site to a larger store on the edge of the town centre;
- Huntingdon (Godmanchester) – provision of small foodstore;
- St Ives – provision of a large Morrisons foodstore on the eastern side of the town;
- St Ives –provision of local shopping facilities within a western residential expansion area:

11.4 Some of these commitments providing new facilities to serve the local needs only of new populations will not affect wider shopping patterns materially. Others such as the major town centre proposals in Huntingdon and large out-of-centre Morrisons store in St Ives will affect shopping patterns in the Study Area and allowance has been made for them in the assessments accordingly.

11.5 Allowance has also been made for the Northstowe first local shopping centre to have been implemented by 2021, for which an appropriate market share of expenditure is included within the forecasts.

11.6 In addition to making adjustments of the market shares to allow for the introduction of new shopping facilities after 2013, allowance is also made for introduction of Phases 1 and 2 of the town centre at 2021 and 2031 respectively, using the convenience and comparison goods turnover estimates at 2021 and 2031 identified in Section 10. Having made a deduction for the town centre convenience and comparison goods turnover attracted from beyond the Study Area (5% of the turnover at 2021 and 10% at 2031), the convenience and comparison goods expenditure attracted to the town centre from the each of the Study Area zones is able to be expressed as a percentage market share of the available convenience and comparison goods expenditure of residents of each zone. The town centre market shares of expenditure attracted from the Core Zone is of the most significance and is summarised in the Table 11.1 below.

Table 11.1 Core Zone Town Centre Market Shares at 2021 and 2031

	Town Centre Phase 1 (2021)	Town Centre Phase 2 (2031)
Convenience Goods	29.3%	25.8%
Comparison Goods	12.6%	16.9%

11.7 The modest market shares of expenditure attracted to the town centre from its catchment are a strong indicator of its role and function within the retail hierarchy, as well as indicating that it is unlikely to have an adverse impact on existing centres and facilities in the area.

Convenience Goods Forecasts

11.8 Tables 7a and 8a of Appendix C show the estimated market shares of available residents' convenience goods expenditure from each zone attracted to centres / facilities at 2021 and 2031. The principal changes from the market shares at 2013 (Table 4a) arise from implementation of new large out-of-centre Sainsbury and Morrisons foodstores in Huntingdon and St Ives respectively. It is assumed they will be implemented by 2021, and will enhance the market shares of expenditure attracted to Huntingdon and St Ives at 2021 and 2031. These have the most significant effect on residents' shopping patterns and therefore market shares within the Secondary and Outer West Zones within which they are located.

11.9 Northstowe town centre will draw most strongly from the Core Zone. It has been estimated that 65% of its Study Area derived convenience turnover will be drawn from Core Zone residents. For a predominantly rural area the Core Zone is unusual in containing a very large Tesco superstore at Bar Hill. This will continue to have a strong influence on shopping patterns within the Core Zone, as well as further afield. The proposals for Northstowe town centre do not include a large foodstore of the scale that exists at Bar Hill, and allowance has been made for a high proportion of Northstowe residents' main food shopping trips to continue to be attracted to Tesco Bar Hill. At 2021 approximately 29% of Core Zone convenience expenditure is forecast to be attracted Northstowe Town Centre and approximately 27% to be attracted to Bar Hill. These market shares remain broadly similar at 2031, with the continuing strengthening of the town centre offer, including a further supermarket in line with population growth within the settlement.

11.10 Table 11.2 below summarises the market share of convenience goods expenditure attracted to Northstowe and other centres from the Core Zone at 2013, 2021 and 2031.

Table 11.2 Core Zone Convenience Goods Market Shares 2013-2031

	2013	2021	2031
Northstowe Town Centre	0%	29.3%	25.8%
Northstowe Local Centre	0%	5%	5%
Bar Hill	50.5%	27.1%	27.2%
Core Zone Village Centres	15%	10%	10.0%
Milton	12%	6.5%	7.9%
St Ives Town Centre	2%	2%	2%
St Ives Out-of-Centre	1%	3%	3%
Huntingdon Town Centre	0%	0.%	0%
Huntingdon Out-of-Centre	1%	0.5%	0.5%
Cambourne	3%	3%	3%
Cambridge City Centre	3%	3%	3%
Cambridge Out-of-Centre	4%	2%	2%
SFT	2.5%	4.6%	5.6%
Total	100%	100%	100%

11.11 Tables 7b and 8b of Appendix C translate the market share figures from Tables 7a and 8a into figures of actual expenditure based on the increased available residents' expenditure at the forecast years (Table 2a).

11.12 The final column of each table compares the potential centre turnovers (Study Area derived only) at 2021 and 2031 with the turnover at the base year - 2013. It is important to note that for Cambridge in particular much of the City's turnover is drawn from outside the Study Area, and the figures in this table do not therefore indicate the overall effect on the City. This is addressed in Section 12. The findings of tables 7b and 8b are reproduced in Table 11.3 below, which compares the turnover achievement of centres at 2021 and 2031 as against their performance at 2013.

Table 11.3 Centre Convenience Goods Turnover Performance 2013-2031 (arising from Study Area residents' expenditure diversions only)

	2013	2021	2031
Bar Hill	100%	66.6%	92.3%
Core Zone Village Centres	100%	85.4%	118.3%
Milton	100%	91.7%	99.3%
St Ives Town Centre	100%	82.1%	103.9%
St Ives Out-of-Centre	100%	426.8%	509.8%
Huntingdon Town Centre	100%	75.7%	81.9%
Huntingdon Out-of-Centre	100%	146%	167.6%
Cambourne	100%	104.4%	125.2%
Cambridge City Centre	100%	99.1%	119.7%
Cambridge Out-of-Centre	100%	103.5%	118.7%

11.13 The percentage decline of turnover experienced at Bar Hill caused by major foodstore proposals in Huntingdon and St Ives as well as Northstowe is evident, although there is significant recovery by 2031. These figures have to be seen in the context of Bar Hill trading strongly at 2013. The major turnover growth at St Ives Out-of-Centre is caused by the commitments in the town – principally a large Morrison's foodstore. The Morrison's proposals also have some effect on the performance of St Ives town centre convenience retailing. A similar pattern is shown in Huntingdon with Sainsbury relocating to an out-of-centre location causing a growth of out-of-centre turnover at the expense of the town centre.

Comparison Goods Forecasts

11.14 Tables 10a and 11a of Appendix C show the estimated market shares of available residents' comparison goods expenditure from each zone attracted to centres / facilities at 2021 and 2031.

11.15 As with convenience goods, Northstowe town centre will draw most strongly from the Core Zone. It has been estimated that 65% of its Study Area derived comparison goods turnover will be drawn from Core Zone residents and 55% at 2031. The latter reflects the wider range of comparison goods facilities in the town centre by 2031, which will draw more shoppers from further afield (and therefore reduce slightly the percentage proportion from the Core Zone).

11.16 The strong draw of Cambridge City for comparison goods shopping has been noted in Section 8. At 2013 Cambridge attracts around 70% of comparison goods expenditure from both the Core Zone and Secondary Zones, and over 50% from the Outer Zone West. These market share figures demonstrate the strong draw of the City Centre in particular from a wide area.

11.17 Table 11.4 below summarises the market share of comparison goods expenditure attracted to Northstowe and other centres from the Core Zone at 2013, 2021 and 2031.

Table 11.4 Core Zone Comparison Goods Market Shares 2013-2031

	2013	2021	2031
Northstowe Town Centre	0%	12.6%	16.9%
Northstowe Local Centre	0%	1%	1%
Bar Hill	8.2%	3.9%	3.7%
Core Zone Village Centres	1%	0.6%	0.4%
Milton	0%	0%	0%
St Ives Town Centre	2%	2%	2%
St Ives Out-of-Centre	0%	0.5%	0.5%
Huntingdon Town Centre	1%	1%	1%
Huntingdon Out-of-Centre	0%	0%	0%
Cambourne	0%	0%	0%
Cambridge City Centre	52%	45%	43%
Cambridge Out-of-Centre	18%	13%	10.9%
SFT	7%	15.7%	15.9%
Total	100%	100%	100%

11.18 The decline in Cambridge's market share from the Core Zone in 2021 and 2031 does not indicate a decline in the City's draw from its overall catchment. It is merely showing the effects of introducing a new town centre in the Core Zone. The Core Zone represents a limited proportion only of Cambridge's overall catchment.

11.19 Tables 10b and 11b of Appendix C translate the market share figures from Tables 10a and 11a into figures of actual expenditure based on the increased available residents' expenditure at the forecast years (Table 3a).

11.20 The final column of each table compares the potential centre turnovers (Study Area derived only) at 2021 and 2031 with the turnover at the base year - 2013. The findings of theses tables are reproduced in Table 11.5 below, which compares the turnover achievement of centres at 2021 and 2031 as against their performance at 2013.

Table 11.5 Centre Comparison Goods Turnover Performance 2013-2031 (arising from Study Area residents' expenditure diversions only)

	2013	2021	2031
Bar Hill	100%	108.3%	157.1%
Core Zone Village Centres	100%	92%	104.4%
Milton	100%	131.7%	187.7%
St Ives Town Centre	100%	132.2%	187.8%
St Ives Out of Centre	100%	402.1%	405.6%
Huntingdon Town Centre	100%	185.3%	242.4%
Huntingdon Out-of-Centre	100%	130.4%	188.8%
Cambourne	100%	138.9%	203%
Cambridge City Centre	100%	122.4%	183.7%
Cambridge Out-of-Centre	100%	105.4%	133.9%

11.21 The growth of turnover potential for comparison goods is noticeably greater than for convenience goods within the centres. This is because of the higher growth rate of comparison goods expenditure, which has been noted in section 7. The high levels of growth indicate the potential for new comparison goods floorspace during the forecast period. This is consistent with the GVA Retail Study findings, referred to in Section 3, which identify potential for additional comparison goods floorspace by 2031.

12 Town Centre Retail Impact

12.1 In Section 2 the NPPF tests in respect in respect of 'impact' have been identified. These are:

> *"the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and*
>
> *the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should also be assessed up to ten years from the time the application is made."*

Impact of the Proposal on Investment in a Centre

12.2 The nearest town centres to Northstowe are at Cambridge and St Ives. Plainly investment in a centre of the size of Cambridge City is an ongoing process. The most recent major investment in retail facilities has been in the Grand Arcade and Christ's Lane developments, to which reference has been made in Section 4. Having regard to the very small trade diversions from Cambridge that are described below, no prejudicial effects on any investment proposals in the City Centre are envisaged.

12.3 Likewise, this Study has not identified any investment proposals in St Ives town centre that would be adversely affected. As noted in Section 4 the major retail investment proposal in St Ives recently resolved for approval by Huntingdonshire Council (a large Morrison's foodstore) is in an out-of-centre location.

12.4 There are major investment proposals afoot in Huntingdon in the form of the Chequers Court redevelopment, which is proposed to introduce new comparison goods retailers into the town centre. This is an ambitious and challenging scheme. However, because of the distance of Huntingdon town centre from Northstowe and the scale and type of shopping proposed at Northstowe, the forecast trade diversions from Huntingdon town centre arising from the Northstowe town centre proposals will be very small – see below. The principal competitors for Huntingdon town centre comparison goods trade are Cambridge and Peterborough at a higher level in the retail hierarchy. The Northstowe town centre proposals will not therefore have a prejudicial effect on investment proposals in Huntingdon town centre.

12.5 The Study has also not identified investment proposals in smaller nearby centres that might be prejudiced. A planning permission for a small Co-Op store in Longstanton has been noted in Section 4, which has been pursued in knowledge of the strategy to provide a new town centre at Northstowe.

Impact on Town Centre Vitality and Viability

Methodology

12.6 The conventional methodology for assessing impact on town centre vitality and viability is to identify the diversions of trade that would arise on implementation of the proposals and to assess the 'before' and 'after' turnovers of affected centres. In isolation, however, this approach has no regard to the level of turnover being achieved by the affected centres and their ability to withstand this impact. The latter is of particular relevance in this case. The application proposal is to provide a new town centre for residents of a new settlement. In the absence of the application proposal residents would be forced to travel to shopping centres / facilities elsewhere, which as a consequence would be trading exceptionally strongly for a temporary period until new facilities are provided in Northstowe. Using the standard methodology, it would be difficult to identify damaging impact on existing facilities elsewhere, as opposed to impact arising from the relocation to Northstowe of exceptional levels of turnover achieved in the temporary absence of adequate facilities in Northstowe.

12.7 The need to adopt a realistic approach with meaningful outputs is recognised in the government's PPG referred to in Section 2. One of the steps to which it refers when undertaking an impact assessment is:

> *"examine the 'no development' scenario (which should not necessarily be based on the assumption that all centres are likely to benefit from expenditure growth in convenience and comparison goods and reflect both changes in the market or role of centres, as well as changes in the environment such as new infrastructure)"*

12.8 In considering the origin of the new town centre convenience and comparison goods turnover, regard has first been had to the levels of convenience and comparison goods expenditure that will be generated by the new Northstowe residents by 2021 and 2031 (identified in Appendix C Tables 2b and 3b). This new expenditure provides a justification for new floorspace without there needing to be any adverse trade impact on existing facilities.

12.9 Table 12.1 below makes a simple comparison between the convenience and comparison goods expenditure of Northstowe residents by 2021 and 2031, and the convenience and comparison goods turnover requirement of the town centre proposals subject of the planning application (Appendix C, Table 6).

Table 12.1 Northstowe Residents' Expenditure and Town Centre Turnover

	2021 Expenditure	2021 Turnover	2031 Expenditure	2031 Turnover
Convenience Goods	£10.07m	£45.93m	£33.12m	£63.43m
Comparison Goods	£22.3m	£47.14m	£90.8m	£133.49m

12.10 Plainly not all Northstowe residents' expenditure will be spent in the town centre. Also the town centre will serve a wider area than the new settlement alone. However, the figures do indicate the substantial amount of turnover requirement that will be generated by the new residents without there needing to be any adverse impact on existing facilities in the area.

12.11 For the avoidance of any doubt, the figures below express the 2031 trade impact of the total scheme, Phases 1 and 2 combined. A comparison is made at 2031 of the position with and without the town centre scheme as a whole (Phases 1 and 2) implemented.

Convenience Goods

12.12 Our assessment of convenience goods trade impacts at 2021 and 2031 are set out in Appendix C Tables 9a and 9b and are summarised in Tables 12.2 and 12.3 below.

Table 12.2 Northstowe Town Centre Convenience Goods Trade Impacts 2021

	Centre Turnover 2021 £m	Origin of Town Centre turnover	Trade Diversion £m	Residual Centre Turnover £m	Trade Impact
Northstowe residents		22%	£10.1		
Bar Hill	£71.95	28%	£12.86	£59.09	-17.9%
Core Zone Village Centres	£11.31	2%	£0.92	£10.39	-8.1%
Milton	£42.5	9%	£4.13	£38.37	-9.7%
St Ives Town Centre	£23.45	5%	£2.3	£21.15	-9.8%
St Ives Out of Centre	£35.9	8%	£3.67	£32.23	-10.2%
Huntingdon Town Centre	£25.51	2%	£0.92	£24.59	-3.6%
Huntingdon Out--of-Centre	£53.16	4.5%	£2.07	£51.09	-3.9%
Cambridge City Centre	£18.7	1%	£0.46	£18.24	-2.5%
Cambridge Out-of-Centre	£156	12.5%	£5.74	£150.26	-3.7%

Table 12.3 Northstowe Town Centre Convenience Goods Trade Impacts 2031

	Centre Turnover 2021 £m	Origin of Town Centre turnover	Trade Diversion £m	Residual Centre Turnover £m	Trade Impact
Northstowe residents		50%	£31.71		
Bar Hill	£93.3	18.5%	£11.73	£81.57	-12.6%
Core Zone Village Centres	£15.34	1.5%	£0.95	£14.39	-6.2%
Milton	£43.95	4%	£2.54	£41.41	-5.8%
St Ives Town Centre	£28.92	3.5%	£2.22	£26.7	-7.7%
St Ives Out-of-Centre	£41.55	5%	£3.17	£38.38	-7.6%
Huntingdon Town Centre	£27.2	1%	£0.63	£26.56	-2.3%
Huntingdon Out-of-Centre	£59.83	2%	£1.27	£58.56	-2.1%
Cambridge City Centre	£20.7	1%	£0.63	£20.7	-3.1%
Cambridge Out-of-Centre	£173	8%	£3.67	£169.33	-2.1%

12.13 A key consideration of the assessments is the amount of turnover justified by the new residential population in Northstowe, which is identified before assessing adverse trade diversions from existing centres and facilities. The convenience goods expenditure that would be generated by the new Northstowe residents at 2021 and 2031 has been noted above as £10.07m and £33.12m respectively. An equivalent amount of turnover is capable of being supported in the town centre without any adverse trade impact being experienced by existing facilities elsewhere. These levels of turnover level are therefore identified in the tables before allocating the remaining turnover as trade diversions from specific centres. The percentage diversions from specific centres are Deloitte judgements based on the locations and types of trading at competing centres.

12.14 The greatest trade diversions would be from Bar Hill, because of its wide offer and proximity to Northstowe. This is followed by trade diversions from Cambridge Out-of-Centre, St Ives Out-of-centre, Milton, and Cambridge Out-of-Centre facilities. The findings in respect of Bar Hill and Milton are consistent with GVA Retail Study 2008 Study findings, to which reference has been made in Section 3.

12.15 We have noted above the household survey figures in respect of Bar Hill and Milton are dominated by the performance of the two Tesco stores. We have shown in Tables 9a and 9b an estimated 'benchmark, turnover for the Tesco Bar Hill and Milton stores at 2021 and 2031 based on current published Tesco company average figures projected to these dates. A comparison of the post impact forecast turnovers for these centres with 'benchmark' averages, indicates that Bar Hill would be trading over 15% below company average at 2021, but would have recovered and be above company average again by 2031. Milton is shown as continuing to trade above company average throughout. However, we are cautious about the reliability / significance of this finding, as the strong performance arises in part from the small sales area of the Milton store relative to its gross floorspace. With benchmark averages being calculated on sales areas, this gives rise to a high sales density.

Comparison Goods

12.16 Our assessment of comparison goods trade impacts at 2021 and 2031 are set out in Appendix C Tables 12a and 12b.and are summarised in Tables 12.4 and 12.5 below.

12.17 As with convenience goods, a key consideration of the assessments is the amount of turnover justified by the new residential population in Northstowe, which is identified before assessing adverse trade impact on existing centres and facilities. The comparison goods expenditure that would be generated by the new Northstowe residents at 2021 and 2031 has been noted above as £22.3m and £90.8m respectively. Having regard to the fact that for comparison goods shopping residents would in reality continue to visit Cambridge for many higher order goods purchases rather than use Northstowe facilities, broadly half the comparison goods expenditure generation of Northstowe residents has been taken as being supportable without causing adverse trade impact on centres elsewhere. This represents roughly 25% of the town centre's turnover at 2021 and roughly 35% at 2031. This turnover is identified in the tables before allocating the remaining turnover as trade diversions from specific centres.

12.18 As with convenience goods the percentage diversions from specific centres are Deloitte assumptions based on the locations and types of trading at competing centres.

Table 12.4 Northstowe Town Centre Comparison Goods Trade Impacts 2021

	Centre Turnover 2021 £m	Origin of Town Centre turnover	Trade Diversion £m	Residual Centre Turnover £m	Trade Impact
Northstowe residents		25%	£11.78		
Bar Hill	£35.47	5%	£2.36	£33.11	-6.6%
Core Zone Village Centres	£1.38	0%	£0	£1.38	-0%
Milton	£5.25	0.5%	£0.24	£5.02	-4.5%
St Ives Town Centre	£38.79	3%	£1.41	£37.37	-3.6%
St Ives Out-of-Centre	£8.52	1%	£0.47	£8.05	-5.5%
Huntingdon Town Centre	£108.05	6%	£2.83	£105.23	-2.6%
Huntingdon Out-of-Centre	£14.13	1%	£0.47	£13.66	-3.3%
Cambridge City Centre	£643	28%	£13.2	£629.8	-2.1%
Cambridge Out-of-Centre	£270	23%	£10.84	£259.16	-4%

Table 12.5 Northstowe Town Centre Comparison Goods Trade Impacts 2031

	Centre Turnover 2021 £m	Origin of Town Centre turnover	Trade Diversion £m	Residual Centre Turnover £m	Trade Impact
Northstowe residents		35%	£46.72		
Bar Hill	£54.87	5%	£6.67	£48.2	-12.2%
Core Zone Village centres	£1.57	0%	£0	£1.57	0%
Milton	£7.83	0.5%	£0.67	£7.16	-8.5%
St Ives Town Centre	£57.28	3%	£4	£53.28	-7%
St Ives Out-of-centre	£8.81	0.5%	£0.67	£8.14	-7.6%
Huntingdon Town Centre	£141.69	3.0%	£4	£137.69	-2.8%
Huntingdon Out-of-Centre	£20.44	0.5%	£0.67m	£19.77m	-3.3%
Cambridge City Centre	£870	25%	£33.37	£836.63	-3.8%
Cambridge Out-of-Centre	£366	20%	£26.7	£339.3	-7.3%

12.19 The trade diversions and impact are greater at 2031 than 2021, because of the greater scale and range of comparison goods facilities included within Phase 2 of the town centre proposals.

12.20 By far the biggest trade diversions of comparison goods in both 2021 and 2031 are from Cambridge City, as this is dominant centre in the area for comparison goods shopping. However, because of the scale of facilities both within the City Centre and elsewhere within the City the percentages impacts are small. The greatest percentage impact at around 12% in 2031 is on Bar Hill. The trade diversions from Bar Hill and Milton are linked to the trade diversions for convenience goods. Shoppers at the Tesco foodstores make combined trips for convenience and comparison goods.

12.21 Modest trade diversions and impact are experienced by Huntingdon. These assume implementation of the Chequers Court town centre scheme, which will have strengthened the town's comparison goods offer.

Trade Impact Implications

12.22 The implications of the estimated trade diversions and trade impacts identified above are considered below. As defined 'town centres' in terms of planning policy, Cambridge City Centre, St Ives town centre and Huntingdon town centre are protected by planning policy and particular attention is therefore focussed on these centres.

Cambridge City Centre

12.23 The dominant role played by Cambridge City centre as sub-regional centre has been identified in Section 4. The principal shopping destination is the historic centre, where there is a wide range of multiple as well as independent fashion traders.

12.24 The Grand Arcade is a major recent addition to the shopping offer of the City Centre, opened in 2007. The scheme comprises some 41,800 sq.m gross floorspace and is focussed on fashion retailing, including a wide range of quality clothing and footwear stores in addition to a new John Lewis store.

12.25 The comparison goods shopping floorspace proposed at Northstowe town centre would account for a modest share of available expenditure within both the Study Area and Core Zone. It is inconceivable that the scale and type of retail facilities proposed at Northstowe could have a material adverse impact on the historic core of Cambridge City Centre.

12.26 The Grafton Centre / Fitzroy Street / Burleigh Street area lacks the character and appeal of the historic centre, and has more of a 'mid-market' focus. Compared with the historic centre it is more accessible by car, particularly for residents of the north-west Cambridge area. It is possible that the Grafton Centre / Fitzroy Street / Burleigh Street area could experience more competitive impact from a new town centre at Northstowe than would the historic centre of Cambridge.

12.27 The impact assessments show convenience goods impacts on the City Centre as a whole of around 3% at 2031 (2.5% at 2021); and under 4% for comparison goods at 2031 (approximately 2% at 2021). These very modest levels of impact would not affect the overall vitality and viability of the City Centre, nor its role as the sub-regional shopping centre. The proposals accord with the strategy for Northstowe town centre, requiring that it does not have a significant impact on the role of Cambridge.

St Ives

12.28 St Ives is an historic market town some 12 kms to the north-west of Northstowe. There is easy access between St Ives and Northstowe, particularly by guided bus.

12.29 The town centre contains a number of historic buildings and has an attractive riverside frontage. Key retailers include an edge-of-centre Waitrose adjacent to the guided bus terminus, and Budgen in the town centre. Comparison retailers, include Boots, Mackays, New Look, and Stead and Simpson. In the northern residential areas of the town is a Co-Op foodstore of 1,356 sq.m sales area.

12.30 St Ives currently experiences significant outflows of residents' expenditure, particularly to Bar Hill for convenience goods, and to Cambridge for comparison goods. However

Huntingdonshire Council has recently granted planning consent for a large Morrison's foodstore (5,922 sq.m gross, 2,880 sq.m sales area) on the eastern edge of the town. This will have the effect of clawing trade to St Ives from residents who are currently travelling to Bar Hill in particular. It will also give rise to some impact on the Waitrose supermarket and other convenience shops in the town centre.

12.31 Introduction of a large out-of-centre foodstore into St Ives will have a much more significant effect on shopping patterns in the St Ives area than will the town centre proposals at Northstowe.

12.32 The impact assessments show a convenience goods impact on St Ives town centre of around 10% at 2021 and around 8% at 2031; and under 4% for comparison goods at 2021 and 7% at 2031. These levels of impact should not affect the overall vitality and viability of the town centre. The historic character and attractive environment of St Ives town centre should also ensure that it remains attractive to shoppers.

Huntingdon

12.33 Huntingdon is located some 22 kms to the north-west of Northstowe. It suffers strong competition from both Cambridge and Peterborough for comparison goods shopping, and the town centre has been under some pressure. However, major town centre retail redevelopment proposals are afoot at Chequers Court in the town centre. These proposals involve the relocation of Sainsbury from their current town centre site to an edge-of-centre location, and the introduction of new comparison goods facilities into the town centre.

12.34 Because of its distance from Northstowe, it is unlikely that there would be strong diversions of trade to Northstowe. Huntingdon residents who choose to shop elsewhere would continue to use Cambridge and Peterborough for comparison goods shopping, and the large Bar Hill Tesco store for convenience goods because of its good accessibility via the A14. This is confirmed by very modest trade impacts shown in the impact assessments - a convenience goods impact on the town centre of under 4% at 2021 and only 2.3% at 3% at 2031; and comparison goods impacts at 2021 and 2031 of under 3%. These very modest levels of impact would not affect the overall vitality and viability of the town centre.

Village Centres

12.35 Existing retail provision in the Core Zone, other than at Bar Hill, is in the form of village centres. There are village facilities at Longstanton, Willingham, Over, Swavesey, Cottenham, Girton, and Histon / Impington.

12.36 There are proposals for new local centres to serve new developments in NW Cambridge, which lie close to the border of the defined Core and Secondary Zones. These centres are to serve the new residential populations proposed in NW Cambridge, and for the purposes of this assessment have been treated as being part of the Cambridge City offer.

12.37 The assessment focuses on the village centres in the rural area surrounding Northstowe, which perform an important role for their local communities, mostly for 'top-up', rather than 'main' shopping trips. The effects of changing trends in retailing on small shops have been well documented. They are diverse and include the issues and difficulties faced by independent traders, which have been experienced over a lengthy period. The village shops include a number of independent traders. Because of their small scale and diverse nature, it is not possible to make meaningful quantitative assessments of the future performance of, and impact that would be experienced by, village shops.

12.38 Some impact on the village facilities is inevitable, particularly those closest to Northstowe. However, they are already competing against the close-by Tesco at Bar Hill which is attracting a large proportion of main food shopping trips. Because of this any additional impact on nearby village centres will be less than it would otherwise be. It has also been noted that planning permission has recently been granted for a Co-Op foodstore of 279 sq.m gross at Nelson's Crescent Longstanton, which indicates that there is a role for local shops performing a complementary role to the larger foodstores.

Other Centres

12.39 The other centres and facilities from which trade would be drawn are not protected by planning policy. These include – Bar Hill (principally Tesco), Milton (Tesco), and Cambridge Out-of-Centre facilities.

12.40 Bar Hill will experience significant trade diversions, not only as a result of the Northstowe town centre proposals, but also from new foodstore developments in St Ives, and the Chequers Court and Sainsbury proposals in Huntingdon. Although some of the draw to Bar Hill from beyond the Core Zone is likely to be reduced, the current strong trading performance of the Tesco store, as well as its large size and wide range of convenience and comparison goods on offer, should ensure its viability.

12.41 Similarly, the current strong trading performance of Tesco Milton should ensure its future viability in the face of the trade diversions and impact that it will experience.

12.42 Impacts on Out-of-Centre facilities in Cambridge are modest. Furthermore, most of these limited trade impacts will be on the 'out-of-centre' large foodstores and retail warehouses. These facilities would not be materially affected by the Northstowe town centre proposals, and in any event they are not protected by planning policy.

Findings

12.43 The planning application proposals for Northstowe town centre will draw a limited market share only of the available convenience and comparison goods expenditure of the Core Zone at 2021 and 2031 (see Table 11.1 above). Consequently there will be ample expenditure remaining to maintain the vitality and viability of existing and committed shopping centres / facilities within the area, as is indicated by their growing turnover potential over the forecast period, particularly for comparison goods (see Table 11.5).

12.44 Trade diversions and trade impacts would not be of a scale to risk undermining the vitality and viability of any existing shopping centres.

13 Other Main Town Centre Uses

13.1 It has been indicated in the Introduction to this report that (unlike for Class A1 retail development for which a quantitative assessment has been undertaken) justification for the scale and type of other 'main town centre uses' proposed is provided in qualitative terms only.

The Proposals

13.2 The primary function of all uses proposed within the town centre is to serve the needs of the new Northstowe residents and the immediately surrounding area. We have shown in Section 5 the floorspace of non-retail uses' proposed, which are reproduced in Table 13.1 below.

Table 13.1 Other Main Town Centre Uses Floorspace

	2021 Phase 1 sq.m gross	**2031 Phase 2 sq.m gross**
Class A3 Food and Drink	1,700	3,500
Class B1 Office	2,700	16,200
Leisure	2,000	10,000
Community Facilities	8,000	9,000

Floorspace figures are cumulative (should not be added together)

13.3 Many of the facilities to be provided in the town centre are subject of more detailed explanation in other reports, e.g. community facilities. In this report a summary only is provided of the main town centre facilities proposed. The purpose of this assessment is to demonstrate in planning policy terms that type and scale of facilities proposed are necessary, both to provide for the needs of residents of Northstowe and the surrounding area, and to secure a viable and sustainable town centre consistent with planning policy. The principal uses proposed are as follows.

Class A3 Food and Drink

13.4 Food and drink uses will include cafés, restaurants, bars/licensed premises, and fast food take-aways. Many of these would be likely to be established brands, but independents would also be encouraged.

Class B1 Office

13.5 In addition to residential uses, employment uses contribute to the overall vitality and viability of a town centre. The Cambridge area has a highly developed employment base in the high technology, research, and educational sectors – see submitted Northstowe Economic Development Strategy. Office / studio / workshop uses in the town centre would in part be linked to the opportunities in these sectors. They would also provide for needs from public sector agencies and local service requirements, e.g. professional firms.

Leisure

13.6 Leisure uses would include such uses as cinema, theatre, bowling and clubs. Some of these uses such as theatre provide the opportunity for community involvement and initiatives.

13.7 The proposed town centre square also provides the opportunity for some outdoor leisure activities – exhibitions and outdoor events. All of these uses would be focussed on the needs of Northstowe residents and would contribute to a diverse offer in the town centre, particularly out of normal shopping hours.

Health and Community Facilities

13.8 Health facilities to provide for the local population will embrace a variety of facilities, including premises for GP's, dentists, optometrists, physiotherapists, minor surgery, etc.

13.9 Other community facilities will include - nurseries, health and fitness facilities, meeting rooms / halls, library, youth facilities, and places of worship.

Findings

13.10 The non-retail main town centre uses proposed for the town centre are of a type and scale that are required to serve residents of Northstowe and the immediately surrounding area. They are necessary to establish a vital and viable town centre for Northstowe, and would not have a significant adverse on facilities in Cambridge or any other nearby centre.

14 Conclusions

14.1 This report describes the strategy and economic potential for a new town centre in Northstowe, as well as its impact on existing and committed shopping facilities in the area and is submitted as a supporting document of the planning application for Phase 2 of the new settlement at Northstowe, submitted by the Homes and Communities Agency (HCA).

14.2 The application proposal includes a new town centre for Northstowe, which makes provision for a range of shops, services, cultural, leisure, entertainment and community facilities that will serve the needs of Northstowe and the immediately surrounding area.

14.3 A new town centre is provided for in Northstowe in both the South Cambridgeshire Core Strategy 2007 and South Cambridgeshire Submission Local Plan 2014. More specific policies identifying the objectives for the town centre, its location within Northstowe, and its role and function are set out in the Northstowe Action Area Plan 2007. The requirements and design considerations for the town centre are set out more fully in the Site Wide Design Code and will be articulated more fully in the Phase 2 Design Code.

14.4 Planning policy requires that the scale and retail offer of Northstowe town centre should be such as to create a sustainable form of development for the new settlement, but that it should not perform a role that has a significant impact on the role of Cambridge. The proposals for the town centre have been formulated with these specific considerations in mind.

14.5 The town centre proposals have also been formulated having regard to current market circumstances and occupier requirements. Town centres across the UK are currently facing a period of challenging and rapid change and, in some cases, they are having to face up to a reduced requirement for retail floorspace as out-of-centre retail parks and internet purchases draw footfall away from the traditional high street.

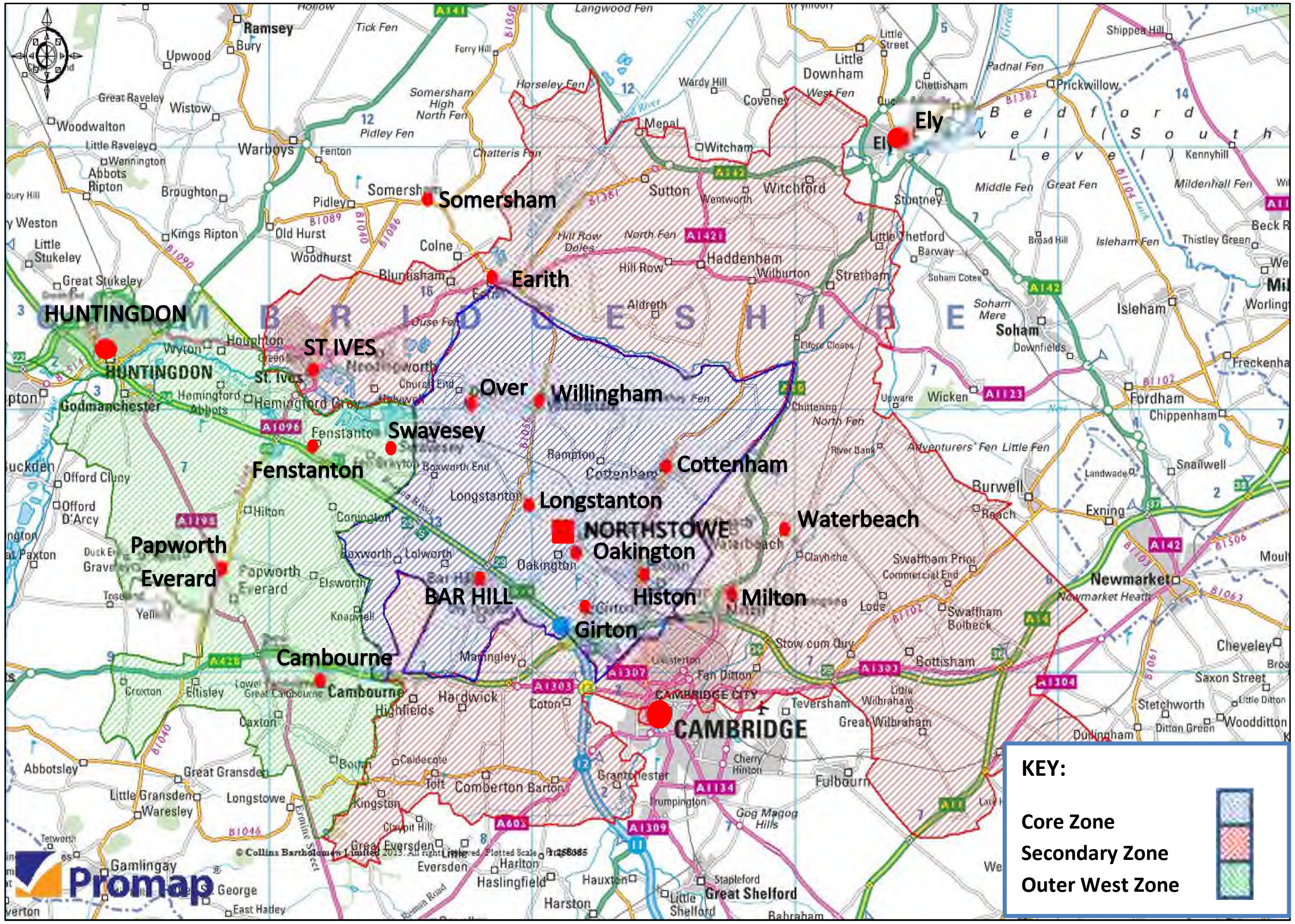
14.6 The proposals are also a response to the hierarchy of shopping centres within the area, in particular the facilities close-by at Bar Hill, which include a wide range of both convenience and comparison goods.

14.7 The assessment identifies the overall growth of convenience and comparison goods expenditure within a defined Study Area and Core Catchment Zone centred on Northstowe. There is a substantial growth of available convenience and comparison goods expenditure over the 2013-2031 forecast period. Within the Core Zone much of this is accounted for by the new population within Northstowe itself. The impact assessment includes allowance for Northstowe residents' expenditure that is needed to support new shopping facilities in Northstowe town centre, and which would not therefore have an adverse impact on existing shopping facilities elsewhere.

14.8 The scale and type of retail floorspace proposed in the town centre will attract a limited market share of available expenditure from its catchment area, and will cause no significant impact impacts on existing centres. In particular it would not adversely affect the role and function of Cambridge City as the sub-regional centre.

14.9 The other 'main town centre' uses proposed, food and drink, leisure, entertainment, community, health, etc. are necessary to provide for the needs of Northstowe residents and to create a vibrant and sustainable town centre for the new settlement.

Appendix A
Study Area Plan


HUNTINGDON
ST IVES
Somersham
Earith
Ely
Over
Willingham
Swavesey
Fenstanton
Cottenham
Longstanton
NORTHSTOWE
Oakington
Waterbeach
Papworth
Everard
BAR HILL
Histon
Milton
Girton
Cambourne
CAMBRIDGE
KEY:
Core Zone
Secondary Zone
Outer West Zone
Promap
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Appendix B
Retail Commitments within the Study Area

NORTHSTOWE

Town Centre Retail Impact Assessment July 2014

TABLE B1 RETAIL COMMITMENTS WITHIN THE STUDY AREA

	App Ref	Gross Floorspace (Net Additional sq.m)
Convenience Goods		
New Foodstore at NW Cambridge		2,000
New Foodsstore at NIAB Site		2,000
Co-Op Longstanton		195
Morrisons St Ives		
St Ives West Urban Design Framework Proposed Retail Unit	N/A	228
Chequers Court Foodstore, Huntingdon TC	1100979FUL	1,395
Chequers Court Additional Retail Units, Huntingdon TC		2,014
Existing Sainsburys Sub-division, Huntingdon TC	10017510UT	3,396
Chequers Court / Germain Walk Major Store Unit, Huntingdon TC		3,700
Loss of Existing Sainsburys Store, Huntingdon TC		-3,224
Sainsburys Replacement Store, Brampton Road, Huntingdon	1001751FUL	5,275
Additional Retail Units, Brampton Road, Huntingdon	1001751FUL	821
Bearscroft Farm Retail Unit, Godmanchester	1200685OUT	600
Co-op, Cambridge Road, Godmanchester	0701280FUL	230
Morrisons Cambourne - Variation of Condition 1 of S/6133/01/RM to increase the limit of maximum net sales area within the food store from 2,800m² to 3,200m².	S/0534/12/VC	400

Comparison Goods		
St Ives West Urban Design Framework Proposed Retail Unit	N/A	228
Chequers Court Foodstore, Huntingdon TC	1100979FUL	1,395
Chequers Court Additional Retail Units		2,014
Existing Sainsburys Sub-division, Huntingdon TC	10017510UT	3,396
Chequers Court / Germain Walk Major Store Unit, Huntingdon TC		3,700
Loss of Existing Sainsburys Store, Huntingdon TC		-3,224
Sainsburys Brampton Road Replacement Store	1001751FUL	5,275
Co-op, Cambridge Road, Godmanchester, PE29 2BT	0701280FUL	230
Additional Retail Units, Brampton Road	1001751FUL	821
Bearscroft Farm Retail Unit, Godmanchester	1200685OUT	600
Morrisons Cambourne - Variation of Condition 1 of S/6133/01/RM to increase the limit of maximum net sales area within the food store from 2,800m² to 3,200m².	S/0534/12/VC	400

Appendix C
Impact Assessment Tables

Appendix C
Impact Assessment Tables

Deloitte.

Job title:

NORTHSTOWE
Town Centre and Local Centres Retail Floorpace Impact Assessment

Client:
Homes and Communities Agency

Date:
Jul-14

NORTHSTOWE PHASE 2

Town Centre Retail Impact Assessment July 2014

TABLE 1: ZONES BY ELECTORAL WARD

1. Core	2. Secondary	3. Outer West
Bar Hill	Arbury (Cambridge)	Bourn
Cottenham	Barton	Fenstanton
Girton	Bottisham	Godmanchester
Histon and Impington	Caldecote	Huntingdon East
Longstanton	Castle (Cambridge)	Huntingdon North
Swavesey	Comberton	Huntingdon West
Willingham and Over	Earith	Papsworth and Elsworth
	East Chesterton (Cambridge)	The Hemingfords
	Haddenham	
	Hardwick	
	Kings Hedges (Cambridge)	
	Milton	
	St Ives East	
	St Ives South	
	Stretham	
	Sutton	
	The Swathams	
	The Wilbrahams	
	Waterbeach	
	West Chesterton (Cambridge)	

Notes:

1. Zones reflect the DTZ Zones within the "Northstowe Retail Capacity and Impact Report" December 2007
2. Ward boundaries taken from http://atlas.cambridgeshire.gov.uk/Profiles/WardProfiles/atlas.html [Accessed 25 November 2013]

NORTHSTOWE

Town Centre Retail Impact Assessment July 2014

TABLE 2a: CONVENIENCE GOODS: POPULATION AND EXPENDITURE PROJECTIONS (£M)

		2013	2021	2026	2031
1. CORE ZONE	Population	40,581	49,656	56,775	63,512
With Northstowe	Average EPH (£)	£1,999	£2,092	£2,178	£2,266
	Total Available Spend (£m)	**£81.11**	**£103.90**	**£123.63**	**£143.92**
2. SECONDARY ZONE	Population	107,528	113,018	117,023	120,985
	Average EPH (£)	£1,853	£1,939	£2,018	£2,100
	Total Available Spend (£m)	**£199.20**	**£219.19**	**£236.18**	**£254.10**
3. OUTER WEST ZONE	Population	56,848	62,992	66,373	69,199
	Average EPH (£)	£1,874	£1,962	£2,042	£2,125
	Total Available Spend (£m)	**£106.55**	**£123.60**	**£135.53**	**£147.04**
TOTAL	**Population**	**204,957**	**225,666**	**240,171**	**253,696**
With Northstowe	**Total Available Spend (£m)**	**£386.87**	**£446.69**	**£495.34**	**£545.06**

Notes:

1. All monetary figures throughout tables are at 2011 prices
2. Population Estimates 2013-2031 from Experian Micromarketer (November 2013) - Revised ONS population projections
3. Additional Core Zone populations included in the forecasts as a result of Northstowe are set out in Table 2b
4. Base Expenditure per head from Experian Micromarketer (November 2013)
5. Expenditure per head projected utilising Experian RPBN 11 (October 2013) Figure 1a forecast growth rates (assumes constant growth post 2030)

TABLE 2b: NORTHSTOWE HOUSING COMPLETIONS AND CONVENIENCE GOODS EXPENDITURE GROWTH

	Housing Completions	HH Size	Population Growth	Cumul Population Growth	Convenience Expenditure Growth (£m)
2013	0	2.45	0	0	£0.00
2021	1,965	2.45	4,814	4,814	£10.07
2026	2,000	2.45	4,900	9,714	£21.15
2031	2,000	2.45	4,900	14,614	£33.12
Sub Total	**5,965**		**14,614**	**14,614**	**£33.12**
POST 2031	3,535	2.45	8,661	23,275	£52.74
Total	**9,500**		**23,275**	**23,275**	**£85.86**

Notes:

1. Northstowe Completions from Proposed Submission Local Plan, Chapter 2 Figure 3 Page 39

NORTHSTOWE

Town Centre Retail Impact Assessment July 2014

TABLE 3a: COMPARISON GOODS: POPULATION AND EXPENDITURE PROJECTIONS (£M)

		2013	2021	2026	2031
1. CORE ZONE	Population	40,581	49,656	56,775	63,512
With Northstowe	Average EPH (£)	£3,695	£4,631	£5,343	£6,164
	Total Available Spend (£m)	**£149.96**	**£229.97**	**£303.34**	**£391.47**
2. SECONDARY ZONE	Population	107,528	113,018	117,023	120,985
	Average EPH (£)	£3,365	£4,218	£4,866	£5,614
	Total Available Spend (£m)	**£361.88**	**£476.69**	**£569.42**	**£679.16**
3. OUTER WEST ZONE	Population	56,848	62,992	66,373	69,199
	Average EPH (£)	£3,442	£4,314	£4,977	£5,741
	Total Available Spend (£m)	**£195.67**	**£271.74**	**£330.32**	**£397.30**
TOTAL	**Population**	**204,957**	**225,666**	**240,171**	**253,696**
With Northstowe	**Total Available Spend (£m)**	**£707.50**	**£978.39**	**£1,203.08**	**£1,467.93**

Notes:

1. All monetary figures throughout tables are at 2011 prices
2. Population Estimates 2013-2031 from Experian Micromarketer (November 2013) - Revised ONS population projections
3. Additional Core Zone populations included in the forecasts as a result of Northstowe are set out in Table 3b
4. Base Expenditure per head from Experian Micromarketer (November 2013)
5. Expenditure per head projected forward utilising Experian RPBN 11 (October 2013) Figure 1a forecast growth rates (assumes constant grc

TABLE 3b: NORTHSTOWE HOUSING COMPLETIONS AND COMPARISON GOODS EXPENDITURE GRO\

	Housing Completions	HH Size	Population Growth	Cumul Population Growth	Comparison Expenditure Growth (£m)
2013	0	2.45	0	0	£0.00
2021	1,965	2.45	4,814	4,814	£22.30
2026	2,000	2.45	4,900	9,714	£51.90
2031	2,000	2.45	4,900	14,614	£90.08
Sub Total	**5,965**		**14,614**	**14,614**	**£90.08**
POST 2031	3,535	2.45	8,661	23,275	£143.46
Total	**9,500**		**23,275**	**23,275**	**£233.54**

Notes:

1. Northstowe Completions from Proposed Submission Local Plan, Chapter 2 Figure 3 Page 39
2. More recent forecasts aim for 10,000 housing completions overall
3. Household size estimates derived on East of England Forecasting Model estimates 2013

NORTHSTOWE

Town Centre Retail Impact Assessment July 2014

TABLE 4a: CONVENIENCE GOODS MARKET SHARES 2013 (WITHOUT NORTHSTOWE)

	1. CORE ZONE	2. SECONDARY ZONE	3. OUTER WEST ZONE
CORE ZONE			
Bar Hill	50.5%	15.5%	11.0%
Principal Village Centres	15.0%	0.0%	0.0%
SECONDARY ZONE			
Milton	12.0%	15.0%	0.0%
St Ives Town Centre	2.0%	6.0%	9.0%
St Ives (Out of Centre)	1.0%	3.0%	0.0%
OUTER WEST ZONE			
Huntingdon Town Centre	0.0%	3.0%	22.0%
Huntingdon (Out of Centre)	1.0%	4.0%	21.5%
Cambourne	3.0%	3.0%	25.0%
Cambridge			
Cambridge City Centre	3.0%	6.0%	1.0%
Cambridge (Out of Centre)	4.0%	20.0%	0.0%
OTHER LOCATIONS	**6.0%**	**22.0%**	**8.0%**
Special Forms of Trading	**2.5%**	**2.5%**	**2.5%**
TOTAL	**100.00%**	**100.00%**	**100.00%**

Notes:
1. Existing convenience goods market shares informed by DTZ "Northstowe Retail Capacity and Impact Report" December 20
2. Revised to take into account developments since DTZ surveys - see Section 3 of Report
3. Revised to take into account 2013 rates for special forms of trading from Experian RPBN 11 (October 2013) Appendix 3
3. SFT rates adjusted to exclude SFT sales from stores (70%)

TABLE 4b: CONVENIENCE GOODS TURNOVERS 2013 (WITHOUT NORTHSTOWE)

	1. CORE ZONE	2. SECONDARY ZONE	3. OUTER WEST ZONE	TOTAL TURNOVER FROM ZONES 2013
CORE ZONE				
Bar Hill	£40.96	£30.88	£11.72	**£83.56**
Principal Village Centres	£12.17	£0.00	£0.00	**£12.17**
SECONDARY ZONE				
Milton	£9.73	£29.88	£0.00	**£39.61**
St Ives Town Centre	£1.62	£11.95	£9.59	**£23.16**
St Ives (Out of Centre)	£0.81	£5.98	£0.00	**£6.79**
OUTER WEST ZONE				
Huntingdon Town Centre	£0.00	£5.98	£23.44	**£29.42**
Huntingdon (Out of Centre)	£0.81	£7.97	£22.91	**£31.69**
Cambourne	£2.43	£5.98	£26.64	**£35.05**
CAMBRIDGE				
Cambridge City Centre	£2.43	£11.95	£1.07	**£15.45**
Cambridge (Out of Centre)	£3.24	£39.84	£0.00	**£43.09**
OTHER LOCATIONS	**£4.87**	**£43.82**	**£8.52**	**£57.22**
Special Forms of Trading	**£2.03**	**£4.98**	**£2.66**	**£9.67**
TOTAL AVAILABLE EXPENDITURE	**£81.11**	**£199.20**	**£106.55**	**£386.87**

Notes:
1. Derived from 2013 market shares in Table 4a
2. Total available expenditure in 2013 from Table 2a

NORTHSTOWE

Town Centre Retail Impact Assessment July 2014

TABLE 5a: COMPARISON GOODS MARKET SHARES 2013 (WITHOUT NORTHSTOWE)

	1. CORE ZONE	2. SECONDARY ZONE	3. OUTER WEST ZONE
CORE ZONE			
Bar Hill	8.2%	3.0%	3.0%
Principal Village Centres	1.0%	0.0%	0.0%
SECONDARY ZONE			
Milton	0.0%	1.0%	0.0%
St Ives Town Centre	2.0%	3.0%	6.0%
St Ives Out of Centre	0.0%	0.5%	0.0%
OUTER WEST ZONE			
Huntingdon Town Centre	1.0%	3.0%	20.0%
Huntingdon (Out of Centre)	0.0%	1.0%	3.0%
Cambourne	0.0%	0.0%	1.0%
CAMBRIDGE			
Cambridge City Centre	52.0%	51.5%	40.0%
Cambridge (Out of Centre)	18.0%	18.0%	13.0%
OTHER LOCATIONS	**7.0%**	**8.2%**	**3.2%**
Special Forms of Trading	**10.8%**	**10.8%**	**10.8%**
TOTAL	**100.00%**	**100.00%**	**100.00%**

Notes:

1. Existing comparison goods market shares informed by DTZ "Northstowe Retail Capacity and Impact Report" December 2007
2. Market shares revised to take into account developments since DTZ surveys, particularly Grand Arcade Cambridge
3. Market shares revised to take into account 2013 rates for special forms of trading from Experian RPBN 11 (October 2013) Appendix 3
4. SFT rates adjusted to exclude SFT sales from stores (25%)

TABLE 5b: COMPARISON GOODS TURNOVERS 2013 (WITHOUT NORTHSTOWE)

	1. CORE ZONE	2. SECONDARY ZONE	4 OUTER WEST ZONE	TOTAL FROM CATCHMENT
CORE ZONE				
Bar Hill	£12.30	£10.86	£5.87	**£29.02**
Principal Village Centres	£1.50	£0.00	£0.00	**£1.50**
SECONDARY ZONE				
Milton	£0.00	£3.62	£0.00	**£3.62**
St Ives Town Centre	£3.00	£10.86	£11.74	**£25.60**
St Ives Out of Centre	£0.00	£1.81	£0.00	**£1.81**
OUTER WEST ZONE				
Huntingdon Town Centre	£1.50	£10.86	£39.13	**£51.49**
Huntingdon (Out of Centre)	£0.00	£3.62	£5.87	**£9.49**
Cambourne	£0.00	£0.00	£1.96	**£1.96**
CAMBRIDGE				
Cambridge City Centre	£77.98	£186.37	£78.27	**£342.61**
Cambridge (Out of Centre)	£26.99	£65.14	£25.44	**£117.57**
OTHER LOCATIONS	**£10.50**	**£29.67**	**£6.26**	**£46.43**
Special Forms of Trading	**£16.20**	**£39.08**	**£21.13**	**£76.41**
TOTAL AVAILABLE EXPENDITURE	**£149.96**	**£361.88**	**£195.67**	**£707.50**

Notes:

1. Derived from 2013 market shares in Table 5a
2. Total available expenditure in 2013 from Table 3a

NORTHSTOWE

Town Centre Retail Impact Assessment July 2014

TABLE 6: Turnover of Northstowe Town Centre

PHASE 1	Gross Floorspace sq. m	Net Floorspace Sq. M	Turnover per Sq m 2021	Total Turnover 2021	Total Turnover 2031
Convenience Goods					
Class A1 Premium Foodstore	4,500	2,205	£13,835	£30.51	£30.81
Class A1 Discount Foodstore	1,500	1,020	£13,835	£14.11	£14.25
Class A1 Shops	500	375	£3,500	£1.31	£1.33
TOTAL CONVENIENCE GOODS	**6,500**	**3,600**		**£45.93**	**£46.39**
Comparison Goods					
Class A1 Premium Foodstore		945	£9,176	£8.67	£10.57
Class A1 Discount Foodstore		180	£5,358	£0.96	£1.18
Class A1 Shops	10,000	7,500	£5,000	£37.50	£45.71
TOTAL COMPARISON GOODS	**10,000**	**8,625**		**£47.14**	**£57.46**
TOTAL Phase 1	**16,500**	**12,225**		**£93.07**	**£103.85**

PHASE 2	Gross Floorspace sq. m	Net Floorspace Sq. M	Turnover per Sq m 2031	Total Turnover 2021	Total Turnover 2031
Convenience Goods					
Class A1 Foodstore	3,000	1,470	£10,686		£15.71
Class A1 Shops	500	375	£3,539		£1.33
TOTAL CONVENIENCE GOODS	**3,500**	**1,845**			**£17.04**
Comparison Goods					
Class A1 Foodstore		630	£9,675		£6.09
Class A1 Shops	15,000	11,250	£6,217		£69.94
TOTAL COMPARISON GOODS	**15,000**	**11,880**			**£76.03**
TOTAL Phase 2	**18,500**	**13,725**		**£0.00**	**£93.07**

TOTAL					
TOTAL CONVENIENCE GOODS	**10,000**	**5,445**		**£45.93**	**£63.43**
TOTAL COMPARISON GOODS	**25,000**	**20,505**		**£47.14**	**£133.49**
TOTAL - Phases 1 and 2	**35,000**	**25,950**		**£93.07**	**£196.92**

Notes:

1. Convenience and comparison goods gross retail floorspaces are based on application proposals - Section 5 of Report 'Town Centre Proposals'
2. Gross to Net Ratio Deloitte estimates based on types of retailing
3. Turnover per sq. m for foodstore operators based on Mintel Retail Rankings 2013 and Verdict on Grocers 2013, grown to 2021 and 2031 utilising Figure 4 of the Experian Retail Planner Briefing Note 11 (October 2013

   Convenience Goods: 2014-2020 0%; 2021-2031 0.1%

   Comparison Goods: 2014 1.9%, 2015 2.2%, 2016-2020 2.1%; 2021-2031 2.0%
4. Class A1 Shops turnover per sq. m Deloitte assumptions

NORTHSTOWE

Town Centre Retail Impact Assessment July 2014

TABLE 7a: CONVENIENCE GOODS MARKET SHARES 2021 (WITH NORTHSTOWE)

	1. CORE ZONE	2. SECONDARY ZONE	3. OUTER WEST ZONE
NORTHSTOWE			
Northstowe Town Centre	29.3%	4.6%	4.2%
Local Centres (One)	5.0%	0.0%	0.0%
CORE ZONE			
Bar Hill	27.1%	9.9%	4.7%
Principal Village Centres	10.0%	0.0%	0.0%
SECONDARY ZONE			
Milton	6.5%	13.5%	0.0%
St Ives Town Centre	2.0%	3.5%	7.5%
St Ives (Out of Centre)	3.0%	7.0%	8.5%
OUTER WEST ZONE			
Huntingdon Town Centre	0.0%	3.0%	12.7%
Huntingdon (Out of Centre)	0.5%	3.5%	30.8%
Cambourne	3.0%	4.0%	20.0%
CAMBRIDGE			
Cambridge City Centre	3.0%	5.0%	1.0%
Cambridge (Out of Centre)	2.0%	19.4%	0.0%
OTHER LOCATIONS	**4.0%**	**22.0%**	**6.0%**
Special Forms of Trading	**4.6%**	**4.6%**	**4.6%**
TOTAL	**100.0%**	**100.0%**	**100.0%**

Notes:

1. 2021 market shares have been adjusted to reflect changes in special forms of trading (SFT) derived from Experian RPBN 11 (October 2013) Appendix 3
2. SFT rates adjusted to exclude SFT sales from stores (70%)
3. Market shares revised to take into account of commitments (see Appendix B), the principal ones being Morrisons St Ives and Sainsbury Huntingdon.

TABLE 7B: CONVENIENCE GOODS TURNOVERS 2021 (WITH NORTHSTOWE)

	1. CORE ZONE	2. SECONDARY ZONE	3. OUTER WEST ZONE	TOTAL POTENTIAL TURNOVER FROM ZONES	INDEXED (2013 = 100%)
NORTHSTOWE					
Northstowe Town Centre	£28.36	£10.04	£5.24	**£43.63**	
Local Centres (One)	£5.20	£0.00	£0.00	**£5.20**	
CORE ZONE					
Bar Hill	£28.16	£21.70	£5.81	**£55.67**	**66.6%**
Principal Village Centres	£10.39	£0.00	£0.00	**£10.39**	**85.4%**
SECONDARY ZONE					
Milton	£6.75	£29.59	£0.00	**£36.34**	**91.7%**
St Ives Town Centre	£2.08	£7.67	£9.27	**£19.02**	**82.1%**
St Ives (Out of Centre)	£3.12	£15.34	£10.51	**£28.97**	**426.8%**
OUTER WEST ZONE					
Huntingdon Town Centre	£0.00	£6.58	£15.70	**£22.27**	**75.7%**
Huntingdon (Out of Centre)	£0.52	£7.67	£38.07	**£46.26**	**146.0%**
Cambourne	£3.12	£8.77	£24.72	**£36.60**	**104.4%**
CAMBRIDGE					
Cambridge City Centre	£3.12	£10.96	£1.24	**£15.31**	**99.1%**
Cambridge (Out of Centre)	£2.08	£42.52	£0.00	**£44.60**	**103.5%**
OTHER LOCATIONS	**£4.16**	**£48.22**	**£7.42**	**£59.79**	
Special Forms of Trading	**£4.78**	**£10.08**	**£5.69**	**£20.55**	
TOTAL AVAILABLE EXPENDITURE	**£101.82**	**£219.14**	**£123.64**	**£444.61**	

Notes:

1. 2021 market shares derived from Table 7a
2. Total available expenditure in 2021 from Table 2a
3. Turnover potential for Northstowe derived from Table 6, plus inflow of 5% from beyond Study Area
4. Within Study Area 65% of turnover derived from Core Zone, 23% from Secondary Zone, and 12% from Outer Zone West

NORTHSTOWE

Town Centre Retail Impact Assessment July 2014

TABLE 8a: CONVENIENCE GOODS MARKET SHARES 2031 (WITH NORTHSTOWE)

	1. CORE ZONE	2. SECONDARY ZONE	3. OUTER WEST ZONE
NORTHSTOWE			
Northstowe Town Centre	25.8%	5.2%	4.7%
Local Centres (One)	5.0%	0.0%	0.0%
CORE ZONE			
Bar Hill	27.2%	11.3%	6.3%
Principal Village Centres	10.0%	0.0%	0.0%
SECONDARY ZONE			
Milton	7.9%	11.0%	0.0%
St Ives Town Centre	2.0%	4.0%	7.5%
St Ives (Out of Centre)	3.0%	7.0%	8.5%
OUTER WEST ZONE			
Huntingdon Town Centre	0.0%	3.0%	11.2%
Huntingdon (Out of Centre)	0.5%	3.8%	29.0%
Cambourne	3.0%	4.0%	20.0%
CAMBRIDGE			
Cambridge City Centre	3.0%	5.0%	1.0%
Cambridge (Out of Centre)	2.0%	19.0%	0.0%
OTHER LOCATIONS	**5.0%**	**21.1%**	**6.2%**
Special Forms of Trading	**5.6%**	**5.6%**	**5.6%**
TOTAL	**100.0%**	**100.0%**	**100.0%**

Notes:

1. 2031 market shares have been adjusted to reflect changes in special forms of trading (SFT) derived from Experian RPBN 11 (October 2013) Appendix 3
2. SFT rates adjusted to exclude SFT sales from stores (70%)
3. Market shares revised to take into account of commitments (see Appendix B).

TABLE 8b: CONVENIENCE GOODS TURNOVER 2031 (WITH NORTHSTOWE)

	1. CORE ZONE	2. SECONDARY ZONE	3. OUTER WEST ZONE	TOTAL POTENTIAL TURNOVER FROM ZONES	INDEXED (2013 = 100%)
NORTHSTOWE					
Northstowe Town Centre	£37.10	£13.13	£6.85	**£57.08**	
Local Centres (One)	£7.20	£0.00	£0.00	**£7.20**	
CORE ZONE					
Bar Hill	£39.15	£28.71	£9.26	**£77.12**	**92.3%**
Principal Village Centres	£14.39	£0.00	£0.00	**£14.39**	**118.3%**
SECONDARY ZONE					
Milton	£11.37	£27.95	£0.00	**£39.32**	**99.3%**
St Ives Town Centre	£2.88	£10.16	£11.03	**£24.07**	**103.9%**
St Ives (Out of Centre)	£4.32	£17.79	£12.50	**£34.60**	**509.8%**
OUTER WEST ZONE					
Huntingdon Town Centre	£0.00	£7.62	£16.47	**£24.09**	**81.9%**
Huntingdon (Out of Centre)	£0.72	£9.76	£42.64	**£53.12**	**167.6%**
Cambourne	£4.32	£10.16	£29.41	**£43.89**	**125.2%**
CAMBRIDGE					
Cambridge City Centre	£4.32	£12.70	£1.47	**£18.49**	**119.7%**
Cambridge (Out of Centre)	£2.88	£48.28	£0.00	**£51.16**	**118.7%**
OTHER LOCATIONS	**£7.20**	**£53.61**	**£9.12**	**£69.93**	**122.2%**
Special Forms of Trading	**£8.06**	**£14.23**	**£8.23**	**£30.52**	**315.6%**
TOTAL AVAILABLE EXPENDITURE	**£143.89**	**£254.12**	**£146.98**	**£544.99**	**140.9%**

Notes:

1. 2031 market shares derived from Table 8a
2. Total available expenditure in 2031 from Table 2a
3. Turnover potential for Northstowe derived from Table 6, plus inflow of 10% from beyond study area
4. Within Study Area 65% of turnover derived from Core Zone, 23% from Secondary Zone, and 12% from Outer Zone West

NORTHSTOWE

Town Centre Retail Impact Assessment July 2014

TABLE 9a: CONVENIENCE GOODS TRADE IMPACT 2021

	TURNOVER FROM ZONES 2013	TURNOVER FROM STUDY AREA (PRE-NORTHSTOWE) 2021	TURNOVER (PRE-NORTHSTOWE) 2021	DIVERSION TO NORTHSTOWE (%)	DIVERSION TO NORTHSTOWE (£M)	TURNOVER (POST NORTHSTOWE) 2021	BENCHMARK TURNOVER £m	TRADE IMPACT %
NORTHSTOWE TOWN CENTRE TURNOVER					**£45.93**			
New Northstowe residents exp								
inc within Phase 1 Local Centre				22.0%	£10.10			
CORE ZONE								
Bar Hill	£83.56	£68.53	£71.95	28.0%	£12.86	£59.09	£71.99	**-17.9%**
Principal Village Centres	£12.17	£11.31	£11.31	2.0%	£0.92	£10.39		**-8.1%**
SECONDARY ZONE								
Milton	£39.61	£40.48	£42.50	9.0%	£4.13	£38.37	£21.23	**-9.7%**
St Ives Town Centre	£23.16	£21.32	£23.45	5.0%	£2.30	£21.15		**-9.8%**
St Ives (Out of Centre)	£6.79	£32.64	£35.90	8.0%	£3.67	£32.23		**-10.2%**
OUTER WEST ZONE								
Huntingdon Town Centre	£29.42	£23.19	£25.51	2.0%	£0.92	£24.59		**-3.6%**
Huntingdon (Out of Centre)	£31.69	£48.33	£53.16	4.5%	£2.07	£51.09		**-3.9%**
Cambourne	£35.05	£37.06	£38.92	1.0%	£0.46	£38.46		**-1.2%**
CAMBRIDGE								
Cambridge City Centre	£15.45	£15.77	£18.70	1.0%	£0.46	£18.24		**-2.5%**
Cambridge (Out of Centre)	£43.09	£50.34	£156.00	12.5%	£5.74	£150.26		**-3.7%**
OTHER LOCATIONS				**5.0%**	**£2.30**			
TOTAL				**100.0%**	**£45.93**			

Notes:
1. Northstowe Town Centre turnover from Table 6
2. 2013 Turnover from Table 4b
3. 2021 pre-Northstowe turnover from tables 7b from which the diversion to Northstowe is added
5. 2021 turnovers for Cambridge derived from GVA Retail Study Update 2013
6. Trade diversions as a result of Northstowe Town Centre Deloitte assumptions
7. Benchmark turnovers are based on a notional sales density of 12,510 pounds per sq m multiplied by the convenience sales areas of the stores.

TABLE 9B: CONVENIENCE GOODS TRADE IMPACT 2031

	TURNOVER FROM ZONES 2013	TURNOVER FROM STUDY AREA (PRE-NORTHSTOWE) 2031	TURNOVER (PRE-NORTHSTOWE) 2031	DIVERSION TO NORTHSTOWE (%)	DIVERSION TO NORTHSTOWE (£M)	TURNOVER (POST NORTHSTOWE) 2031	BENCHMARK TURNOVER £m	TRADE IMPACT %
NORTHSTOWE TOWN CENTRE TURNOVER					**£63.43**			
New Northstowe residents exp								
inc within Phase 1 Local Centre				50.0%	£31.71			
CORE ZONE								
Bar Hill	£83.56	£88.86	£93.30	18.5%	£11.73	£81.57	£71.99	**-12.6%**
Principal Village Centres	£12.17	£15.34	£15.34	1.5%	£0.95	£14.39		**-6.2%**
SECONDARY ZONE								
Milton	£39.61	£41.86	£43.95	4.0%	£2.54	£41.41	£21.23	**-5.8%**
St Ives Town Centre	£23.16	£26.29	£28.92	3.5%	£2.22	£26.70		**-7.7%**
St Ives (Out of Centre)	£6.79	£37.77	£41.55	5.0%	£3.17	£38.38		**-7.6%**
OUTER WEST ZONE								
Huntingdon Town Centre	£29.42	£24.73	£27.20	1.0%	£0.63	£26.56		**-2.3%**
Huntingdon (Out of Centre)	£31.69	£54.39	£59.83	2.0%	£1.27	£58.56		**-2.1%**
Cambourne	£35.05	£44.21	£46.42	0.5%	£0.32	£46.10		**-0.7%**
CAMBRIDGE								
Cambridge City Centre	£15.45	£19.13	£20.70	1.0%	£0.63	£20.07		**-3.1%**
Cambridge (Out of Centre)	£43.09	£54.83	£173.00	8.0%	£3.67	£169.33		**-2.1%**
OTHER LOCATIONS				**5.0%**	**£3.17**			
TOTAL				**100.0%**	**£62.03**			

Notes:
1. Northstowe Town Centre turnover from Table 6
2. 2013 Turnover from Table 4b
3. 2031 pre-Northstowe turnover from Table 8b from which the diversion to Northstowe is added
4. 2031 turnovers for Cambridge derived from GVA Retail Study Update 2013
5. Trade diversions as a result of Northstowe Town Centre Deloitte assumptions
6. Benchmark turnovers are based on a notional sales density of 12,510 pounds per sq m multiplied by the convenience sales areas of the stores.

NORTHSTOWE

Town Centre Retail Impact Assessment July 2014

TABLE 10a: COMPARISON GOODS MARKET SHARES 2021 (WITH NORTHSTOWE)

	1. CORE ZONE	2. SECONDARY ZONE	3. OUTER WEST ZONE
NORTHSTOWE			
Northstowe Town Centre	12.6%	2.2%	2%
Local Centres (One)	1.0%	0.0%	0%
CORE ZONE			
Bar Hill	3.9%	3.0%	3.0%
Principal Village Centres	0.6%	0.0%	0.0%
SECONDARY ZONE			
Milton	0.0%	1.0%	0.0%
St Ives Town Centre	2.0%	3.0%	5.5%
St Ives Out of Centre	0.5%	1.0%	0.5%
OUTER WEST ZONE			
Huntingdon Town Centre	1.0%	3.0%	29.0%
Huntingdon (Out of Centre)	0.0%	1.0%	2.8%
Cambourne	0.0%	0.0%	1.0%
CAMBRIDGE			
Cambridge City Centre	45.0%	50.0%	28.5%
Cambridge (Out of Centre)	13.0%	14.6%	9.0%
OTHER LOCATIONS	**4.7%**	**5.5%**	**3.0%**
Special Forms of Trading	**15.7%**	**15.7%**	**15.7%**
TOTAL	**100.0%**	**100.0%**	**100.0%**

Notes:

1. 2021 market shares have been adjusted to reflect changes in special forms of trading (SFT) derived from Experian RPBN 11 (October 2013) Appendix 3
2. SFT rates adjusted to exclude SFT sales from stores (25%)
3. Market shares revised to take into account of commitments (see Appendix B).

TABLE 10b: COMPARISON GOODS TURNOVERS 2021 (WITH NORTHSTOWE)

	1. CORE ZONE	2. SECONDARY ZONE	4 OUTER WEST ZONE	TOTAL POTENTIAL TURNOVER FROM ZONES	INDEXED (2013 = 100%)
NORTHSTOWE					
Northstowe Town Centre	£29.11	£10.30	£5.37	**£44.78**	
Local Centres (One)	£2.30	£0.00	£0.00	**£2.30**	
CORE ZONE					
Bar Hill	£8.97	£14.30	£8.15	**£31.42**	**108.3%**
Principal Village Centres	£1.38	£0.00	£0.00	**£1.38**	**92.0%**
SECONDARY ZONE					
Milton	£0.00	£4.77	£0.00	**£4.77**	**131.7%**
St Ives Town Centre	£4.60	£14.30	£14.95	**£33.85**	**132.2%**
St Ives Out of Centre	£1.15	£4.77	£1.36	**£7.28**	**402.1%**
OUTER WEST ZONE					
Huntingdon Town Centre	£2.30	£14.30	£78.80	**£95.40**	**185.3%**
Huntingdon (Out of Centre)	£0.00	£4.77	£7.61	**£12.38**	**130.4%**
Cambourne	£0.00	£0.00	£2.72	**£2.72**	**138.9%**
CAMBRIDGE					
Cambridge City Centre	£103.49	£238.34	£77.44	**£419.27**	**122.4%**
Cambridge (Out of Centre)	£29.90	£69.60	£24.46	**£123.95**	**105.4%**
OTHER LOCATIONS	**£10.81**	**£26.22**	**£8.15**	**£45.18**	**97.3%**
Special Forms of Trading	**£36.10**	**£74.84**	**£42.66**	**£153.61**	**201.0%**
TOTAL AVAILABLE EXPENDITURE	**£230.10**	**£476.50**	**£271.67**	**£978.27**	

Notes:

1. 2021 market shares derived from Table 10a
2. Total available expenditure in 2021 derived from Table 3a
3. Turnover potential for Northstowe derived from Table 6, plus inflow of 5% from beyond study area
4. Within Study Area 65% of turnover derived from Core Zone, 23% from Secondary Zone, and 12% from Outer Zone West

NORTHSTOWE

Town Centre Retail Impact Assessment July 2014

TABLE 11a: COMPARISON GOODS MARKET SHARES 2031 (WITH NORTHSTOWE)

	1. CORE ZONE	2. SECONDARY ZONE	3. OUTER WEST ZONE
NORTHSTOWE			
Northstowe Town Centre	16.9%	5.3%	4.5%
Local Centre	1.0%	0.0%	0.0%
CORE ZONE			
Bar Hill	3.7%	3.0%	2.7%
Principal Village Centres	0.4%	0.0%	0.0%
SECONDARY ZONE			
Milton	0.0%	1.0%	0.0%
St Ives Town Centre	2.0%	3.0%	5.0%
St Ives Out of centre	0.5%	0.5%	0.5%
OUTER WEST ZONE			
Huntingdon Town Centre	1.0%	3.0%	25.3%
Huntingdon (Out of Centre)	0.0%	1.0%	2.8%
Cambourne	0.0%	0.0%	1.0%
CAMBRIDGE			
Cambridge City Centre	43.0%	49.0%	32.3%
Cambridge (Out of Centre)	10.9%	12.8%	7.0%
OTHER LOCATIONS	**4.7%**	**5.5%**	**3.0%**
Special Forms of Trading	**15.9%**	**15.9%**	**15.9%**
TOTAL	**100.0%**	**100.0%**	**100.0%**

Notes:

1. 2031 market shares have been adjusted to reflect changes in special forms of trading (SFT) derived from Experian RPBN 11 (October 2013) Appendix 3
2. SFT rates adjusted to exclude SFT sales from stores (25%)
3. Market shares revised to take into account of commitments (see Appendix B).

TABLE 11b: COMPARISON GOODS TURNOVERS 2031 (WITH NORTHSTOWE)

	1. CORE ZONE	2. SECONDARY ZONE	4 OUTER WEST ZONE	TOTAL POTENTIAL TURNOVER FROM ZONES	INDEXED (2013 = 100%)
NORTHSTOWE					
Northstowe Town Centre	£66.08	£36.04	£18.02	**£120.14**	
Local Centres (Two)	£3.91	£0.00	£0.00	**£3.91**	
CORE ZONE					
Bar Hill	£14.48	£20.37	£10.73	**£45.59**	**157.1%**
Principal Village Centres	£1.57	£0.00	£0.00	**£1.57**	**104.4%**
SECONDARY ZONE					
Milton	£0.00	£6.79	£0.00	**£6.79**	**187.7%**
St Ives Town Centre	£7.83	£20.37	£19.86	**£48.07**	**187.8%**
St Ives Out of Centre	£1.96	£3.40	£1.99	**£7.34**	**405.6%**
OUTER WEST ZONE					
Huntingdon Town Centre	£3.91	£20.37	£100.52	**£124.81**	**242.4%**
Huntingdon (Out of Centre)	£0.00	£6.79	£11.12	**£17.92**	**188.8%**
Cambourne	£0.00	£0.00	£3.97	**£3.97**	**203.0%**
CAMBRIDGE					
Cambridge City Centre	£168.33	£332.79	£128.33	**£629.45**	**183.7%**
Cambridge (Out of Centre)	£42.67	£86.93	£27.81	**£157.41**	**133.9%**
OTHER LOCATIONS	**£18.40**	**£37.35**	**£11.92**	**£67.67**	**145.7%**
Special Forms of Trading	**£62.24**	**£107.99**	**£63.17**	**£233.40**	**305.5%**
TOTAL AVAILABLE EXPENDITURE	**£391.39**	**£679.21**	**£397.44**	**£1,468.04**	

Notes:

1. 2031 market shares derived from Table 11a
2. Total available expenditure in 2031 derived from Table 3a
3. Turnover potential for Northstowe derived from Table 6, plus inflow of 10% from beyond study area
4. Within Study Area 55% of turnover derived from Core Zone, 30% from Secondary Zone, and 15% from Outer Zone West

NORTHSTOWE

Town Centre Retail Impact Assessment July 2014

TABLE 12a: COMPARISON GOODS IMPACT (2021)

	TURNOVER FROM ZONES 2013	TURNOVER FROM STUDY AREA (PRE-NORTHSTOWE) 2021	TURNOVER (PRE-NORTHSTOWE) 2021	DIVERSION TO NORTHSTOWE (%)	DIVERSION TO NORTHSTOWE (£M)	TURNOVER (POST NORTHSTOWE) 2021	TRADE IMPACT %
NORTHSTOWE TOWN CENTRE TURNOVER					**£47.14**		
50% of new Northstowe residents							
expenditure inc Phase 1 Local Centre				25.0%	£11.78		
CORE ZONE							
Bar Hill	£29.02	£33.78	£35.47	5.0%	£2.36	£33.11	**-6.6%**
Principal Village Centres	£1.50	£1.38	£1.38	0.0%	£0.00	£1.38	**0.0%**
SECONDARY ZONE							
Milton	£3.62	£5.00	£5.25	0.5%	£0.24	£5.02	**-4.5%**
St Ives Town Centre	£25.60	£35.26	£38.79	3.0%	£1.41	£37.37	**-3.6%**
St Ives Out of centre	£1.81	£7.75	£8.52	1.0%	£0.47	£8.05	**-5.5%**
OUTER WEST ZONE							
Huntingdon Town Centre	£51.49	£98.23	£108.05	6.0%	£2.83	£105.23	**-2.6%**
Huntingdon (Out of Centre)	£9.49	£12.85	£14.13	1.0%	£0.47	£13.66	**-3.3%**
Cambourne	£1.96	£2.72	£2.85	0.0%	£0.00	£2.85	**0.0%**
CAMBRIDGE							
Cambridge City Centre	£342.61	£432.47	£643.00	28.0%	£13.20	£629.80	**-2.1%**
Cambridge (Out of Centre)	£117.57	£134.79	£270.00	23.0%	£10.84	£259.16	**-4.0%**
OTHER LOCATIONS				**7.5%**	**£3.54**		
TOTAL				**100.0%**	**£47.14**		

Notes:
1. Northstowe Town Centre turnover from Table 6
2. 2013 Turnover from Table 4b
3. 2021 pre-Northstowe turnover from Table 10b from which the diversion to Northstowe is added
4. 2021 turnovers for Cambridge derived from GVA Retail Study Update 2013
5. Trade diversions as a result of Northstowe Town Centre Deloitte assumptions

TABLE 12b: COMPARISON GOODS IMPACT (2031)

	TURNOVER FROM ZONES 2013	TURNOVER FROM STUDY AREA (PRE-NORTHSTOWE) 2031	TURNOVER (PRE-NORTHSTOWE) 2031	DIVERSION TO NORTHSTOWE (%)	DIVERSION TO NORTHSTOWE (£M)	TURNOVER (POST NORTHSTOWE) 2031	TRADE IMPACT %
NORTHSTOWE TOWN CENTRE TURNOVER					**£133.49**		
50% of new Northstowe residents							
expenditure inc Phase 1 Local Centre				35.0%	£46.72		
CORE ZONE							
Bar Hill	£29.02	£52.26	£54.87	5.0%	£6.67	£48.20	**-12.2%**
Principal Village Centres	£1.50	£1.57	£1.57	0.0%	£0.00	£1.57	**0.0%**
SECONDARY ZONE							
Milton	£3.62	£7.46	£7.83	0.5%	£0.67	£7.16	**-8.5%**
St Ives Town Centre	£25.60	£52.07	£57.28	3.0%	£4.00	£53.28	**-7.0%**
St Ives Out of Centre	£1.81	£8.01	£8.81	0.5%	£0.67	£8.14	**-7.6%**
OUTER WEST ZONE							
Huntingdon Town Centre	£51.49	£128.81	£141.69	3.0%	£4.00	£137.69	**-2.8%**
Huntingdon (Out of Centre)	£9.49	£18.58	£20.44	0.5%	£0.67	£19.77	**-3.3%**
Cambourne	£1.96	£3.97	£4.17	0.0%	£0.00	£4.17	**0.0%**
CAMBRIDGE							
Cambridge City Centre	£342.61	£662.82	£870.00	25.0%	£33.37	£836.63	**-3.8%**
Cambridge (Out of Centre)	£117.57	£184.11	£366.00	20.0%	£26.70	£339.30	**-7.3%**
OTHER LOCATIONS				**7.5%**	**£10.01**		
TOTAL				**100.0%**	**£133.49**		

Notes:
1. Northstowe Town Centre turnover from Table 6
2. 2013 Turnover from Table 4b
3. 2021 pre-Northstowe turnover from Table 11b from which the diversion to Northstowe is added
4. 2021 turnovers for Cambridge derived from GVA Retail Study Update 2013
5. Trade diversions as a result of Northstowe Town Centre Deloitte assumptions