Northstowe
Phase 1 Planning Application

Local Centre Strategy and Retail Needs Assessment
(incorporating Retail Capacity Assessment)

February 2012

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Gallagher

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Executive Summary

1 Northstowe is a planned new town, near the villages of Longstanton and Oakington to the north west of Cambridge, within South Cambridgeshire district. A new framework masterplan for Northstowe proposes an alternative structure and phasing of the new settlement, including two neighbourhoods each serviced by a larger local centre, in addition to a town centre.

2 A planning application for Phase 1 proposes 1,500 homes, located immediately adjacent to the B1050 Station Road, to act as a focal point for the new neighbourhood. This report assesses the retail strategy and floorspace needs for the Phase 1 local centre, including the optimum size of supermarket.

3 A review of national guidance on local centres and Cambridgeshire's market towns establishes that there are no local centre comparators for Northstowe Phase 1 within Cambridgeshire. There is therefore a tension between the Northstowe AAP requirements that the Phase 1 local centre provides for day to day shopping whilst only containing modest shopping facilities typical of local centres in Cambridgeshire's market towns. We consider that the local centre must be larger than the very small scale existing village shops, in order to have a sustainable and more self sufficient role, particularly in the absence of Northstowe town centre.

4 The Northstowe Phase 1 local centre primary catchment area has been defined as Longstanton village and Northstowe (broadly 5 minutes drive time), and the secondary catchment area includes the villages of Cottenham, Oakington, Rampton, Willingham, Over and Swavesey (broadly 10 minutes drive time). Existing retail provision within the catchment area villages is limited to very small scale, localised shopping facilities, primarily convenience shops and services serving a 'walk-in' catchment. The existing shopping patterns within the catchment area are dominated by the Tesco Extra store at Bar Hill.

5 Our retail capacity assessment, adopting a standard staged approach consistent with the PPS4 Practice Guidance identifies that the local centre could support a small supermarket.

6 Our assessment of qualitative need against the five factors identified in the PPS4 Practice Guidance, finds that a small supermarket within the local centre at Northstowe Phase 1 will address the qualitative needs of the existing and proposed residents, and remedy the deficiency in retail provision in the catchment area and secure an anchor trader for the centre.

7 Our analysis of the scale of supermarket and other shopping provision in new settlements and urban expansion areas, coupled with current trends in retailer demand and recent appeal decisions, together indicate that the scale of store identified in the needs assessment is likely to be deliverable. We conclude

that a 750-1,000 sq.m net supermarket would be an appropriate sized supermarket to anchor the Northstowe Phase 1 local centre.

8 We anticipate that such a store, if operated by a major retailer, would be new to South Cambridgeshire and would broaden the local retail offer in Northstowe's catchment. It would have a limited main food shopping role, thereby filling the gap between the small convenience shops in the Northstowe Phase 1 catchment villages and the distant superstores. We would, therefore, expect Phase 1 to serve its local centre role and function, whilst complementing existing retail centres and provision.

1.0 Introduction

Northstowe Phase 1

1.1 Northstowe is a planned new town, near the villages of Longstanton and Oakington to the north west of Cambridge, within South Cambridgeshire district. A review of the exemplar plan-led proposals, by Gallagher and the Homes and Community Agency (HCA), following the removal of Treasury funding for the A14 link, has led to the creation of a new framework masterplan. The framework masterplan proposes an alternative structure to the new settlement and its phased delivery.

1.2 This report supports an outline planning application for Phase 1 of Northstowe which proposes 1,500 homes, located immediately adjacent to the north of the village of Longstanton. It includes a local centre situated adjacent to the B1050 Station Road, to act as a focal point for the new neighbourhood, along with an employment area, primary school, sports hub and community facilities.

1.3 The longer term strategy for Northstowe envisages the phased delivery of up to 10,000 houses, a town centre and a second local centre. Phase 1 is to be developed in the context of this strategy, but it is necessary to ensure that the local centre retail provision in Phase 1 is viable and as self-sufficient as possible, as the delivery of the town centre will occur in a later phase of development.

Purpose and Scope of Study

1.4 This report, commissioned by Gallagher, provides an assessment of the strategy and retail needs for the Northstowe Phase 1 Local Centre. It considers the requirements for convenience and comparison goods floorspace that might be expected within this local centre, focusing upon the supermarket as this element is expected to form the anchor to the local centre.

1.5 The report assesses the capacity for convenience and comparison goods floorspace. This has been estimated through identifying the likely catchment area of the new local centre, and calculating the existing and proposed population and available expenditure within the catchment area. Assumptions are then made regarding the likely retention of expenditure, and this is then translated into floorspace requirements.

1.6 The report also provides a qualitative assessment of existing retail provision, particularly focusing on supermarket provision, and the appropriateness of the scale of retail floorspace in comparison with other centres.

1.7 A quantitative retail assessment has not been undertaken, but the above need and scale considerations are used to provide a general indication of competition and/or complementarity with existing centres and retail provision.

1.8 The report provides advice on the optimum size of supermarket that ought to be accommodated within Northstowe Phase 1 Local Centre to inform the Masterplan, and to form part of the Development Framework Plan which is to be submitted as part of a planning application for Northstowe Phase 1 in 2012.

2.0 # Northstowe Settlement and Centre Structure

2.1 The original vision and proposals for Northstowe have been adapted and refined since their inception. The key elements of the vision and proposals and how these have evolved in the development plan, the original 2007 planning application (LPA ref. S/7006/07/O) and 2011 pre-application proposals, are briefly summarised below.

The Development Plan

2.2 The Localism Bill was enacted in November 2011, thereafter becoming the Localism Act. Different parts of the Act will however come into effect at different times over the coming months. The Act enables Regional Strategies, including the East of England Plan to be abolished, but, this will be undertaken by statutory order by the Government in due course (it is currently understood that this will be around April 2012). Despite the imminent revocation of the East of England Plan (adopted May 2008), it is still part of the statutory development plan until formally abolished. For the purpose of this planning application, the statutory development plan at local level is considered to comprise:

- The saved policies of the South Cambridgeshire Local Plan (adopted 2004, as saved 2007);
- The South Cambridgeshire District Council Core Strategy (adopted January 2007);
- The South Cambridgeshire District Council Development Control Policies DPD (adopted July 2007) and Site Specific Policies DPD (adopted January 2010);
- The South Cambridgeshire District Council Northstowe Area Action Plan (AAP) (adopted July 2007).

2.3 Para. 2.10 of the Core Strategy refers to the new town of Northstowe, and states:

"To the north west of Cambridge beyond the current Green Belt, separate from but close to the villages of Longstanton and Oakington, a small new town of up to 10,000 homes will be built, of which 4,800 homes will be provided by 2016. Located east of Longstanton village and north of Oakington village, it will be developed adjoining a new rapid transit route on the line of the former St Ives railway line and make best use of the previously developed land at Oakington Airfield. The new town will include a town centre serving the town and the nearby villages, and a strategic level of new employment principally allowing for the continued growth of the high technology research and development sector. Associated countryside recreation, access and landscape improvements will be provided around the new town."

2.4 Northstowe is identified at Insert A of the Adopted Proposals Map (Appendix 1).

Northstowe Area Action Plan (AAP)

2.5 The Northstowe Area Action Plan (adopted July 2007) (see extracts, Appendix 2) provided the basis for the 2007 Masterplan and for the further detailed planning and approval of individual phases of development. The AAP identifies that one of the key objectives is *"to ensure that local centres provide for the day-to-day needs of local residents for convenience shopping and service provision"* (D2/c). Policy NS/6 states:

"1. The development of Northstowe will make provision for local centres which will:

a. Be appropriately located to the dedicated local busway through the town;

b. Be located with the aim that all the residents of Northstowe are within 600m walk of the town centre or a local centre and that the majority are within 400m distance;

c. Include a primary school; and

d. Provide for the day-to-day needs of local residents for convenience shopping and service provision

2. The local centres will provide a community focus for neighbourhoods within Northstowe…."

2.6 The AAP (D2.1) states that the local centres in Northstowe are to have *"modest shopping facilities",* comprising *"local shops meeting day-to-day needs such as a newsagent, hot food take away or a small convenience store typical of many local centres in Cambridgeshire's market towns"*.

2.7 It also notes that the development of each local centre needs to be appropriately phased to ensure that local services and facilities are available within walking distance of all homes as soon as is practicable. It emphasises that *"it will be especially important for community development to provide a local centre for the first neighbourhood"*.

2.8 In respect of the town centre at Northstowe, the AAP states that it will be important to ensure that the centre is not so large that it threatens the vitality and viability of nearby towns and villages (D1.13).

Outline Planning Application, December 2007

2.9 An outline planning application for the new town of Northstowe was submitted in December 2007. This scheme proposed 9,500 dwellings distributed within a neighbourhood structure incorporating one town centre, one large local centre and four smaller local centres. Retail floorspace would be focused in the town centre with a small amount of convenience floorspace supporting local need in the smaller centres.

2.10 The Town Centre and Local Centres Strategy (Arup, 2007 – see extract, Appendix 3) identifies (para 4.4.2) the town centre area to support a total gross floorspace of 49,500 sq.m (37,500 sq.m retail and 12,000 sq.m services). Class A1 convenience retail, most likely in the form of a foodstore, is allocated an approximate 8,500 sq.m gross floorspace and comparison floorspace was approximated at 29,000 sq.m gross of the total retail floorspace. Four of the five proposed local centres were all anticipated to include approximately 300 – 500 sq.m retail floorspace that would incorporate a local convenience store, newsagent and food / beverage retail. The fifth and most northern local centre (known as Local Centre A), had a proposed 750 – 1,250 sq.m retail floorspace, comprising mini-supermarket as well as smaller shops, post office, newsagent and services.

2.11 The strategy also discusses a number of case studies and reasoning behind the proposed settlement structure. Consistencies across the case studies informed a conclusion that *"schemes of less than 3,000 dwellings generally have one local centre, whilst schemes of between 7,000 - 8,000 dwellings have four or five local centres"* (6.3.1). The structure attempted to follow these general principles whilst also complying with the Northstowe AAP policy NS/6 as mentioned above. The resulting centre strategy for Northstowe seems to reflect these case studies in a neighbourhood settlement led masterplan, providing a local centre for each phase of development alongside housing, services and infrastructure.

2.12 It was intended that the 2007 proposals would be phased. Stage 1 comprised the Northern Gateway, which included Local Centre A in the area of initial development of residential properties (Appendix 2, para 6.5.6, Figure 4). The local centre was intended to serve the needs of the Northern Employment Area, as well as Phase 1 residential area, and contribute to meeting Longstanton's needs (6.4.6 and 6.5.6).

2.13 The Northern Gateway Centre was proposed to contain the following facilities:

Table 2.1 Northern Gateway Centre

Facility	Floorspace
Mini Supermarket	400 sq.m
Newsagent	100 sq.m
Post Office	100 sq.m
Dry Cleaner/Launderette	50 sq.m
Chemist	50 sq.m
2-4 Speciality Shops	200-400 sq.m
Estate Agent	50 sq.m
Restaurant	100 sq.m
Pub	100 sq.m
Hot food takeaway	50 sq.m
Retail	**750 – 1,250 sq.m gross**

2.14 We understand that the 2007 planning application was put on hold as a result of commercial factors attributed to the economy slipping into recession during 2008 and 2009, coupled with the withdrawal of the A14 improvement scheme in the Comprehensive Spending Review (CSR).

Framework Masterplan Review

2.15 Proposals for Northstowe were re-launched by Gallagher and the HCA in 2011 with a review of the masterplan in its entirety (Framework Masterplan) for the purpose of updating and revising the scheme, as well as the preparation of detailed plans for the first phase of development (Phase 1 Illustrative Masterplan), assuming no new highway link to the A14. The Northstowe Development Framework was launched as a Consultation Draft in October 2011 (see extract at Appendix 4). The 2011 review is being informed by comments received from statutory organisations and members of the public, as well as a series of workshops in the local area.

2.16 The settlement size, at up to 10,000 dwellings, remains relatively unchanged, but there is a fundamental change to the neighbourhood structure and the centres strategy and, therefore, the retail provision. The centre structure has shifted from an original plan of one town centre and five local centres to a revised structure of one town centre and two larger supporting local centres. In 2007, it was anticipated that the northern most local centre would be developed in advance of the town centre, thus incorporating service provision that would ultimately be delivered later in the town centre (Appendix 3, para 6.5.7).

2.17 Other key changes include:

- the relocation of the town centre further north, closer to the Phase 1 local centre;
- the northern local centre (Phase 1) located closer to the B1050 Station Road;
- a move towards a phased development plan over a longer timescale than originally expected and;
- a reduction in the overall housing density.

2.18 The vision and proposals for Northstowe have been updated and refined, culminating in a framework masterplan for the new town and an illustrative masterplan for Phase 1 (Appendix 5).

2.19 The centre structure changes as part of the framework masterplan review can also be considered against the conclusions drawn out of the Town Centre and Local Centre Strategy (Appendix 3, para 6.3.1). The range of case studies demonstrated that centre numbers and structure is often guided by dwelling numbers. This principle is still relevant, but none of the case studies themselves are particularly relevant to the framework masterplan for Northstowe and its delivery.

2.20 In reaching this view, we note that the O&H Hampton extension in Peterborough proposes 7,000 dwellings supported by the existing Serpentine Green shopping centre which functions as a district centre (anchored by a Tesco Extra store), and two new neighbourhood centres with top-up convenience shopping facilities (One-Stop store in the first built out neighbourhood centre).

2.21 The first phase of development at Northstowe is planned at the northern end of the site covering 96 ha. It is proposed to incorporate 1,500 homes by 2021, a larger mixed-use local centre (0.65-0.80 ha) comprising shops, residential and community facilities. A school and sports hub are also to be key features of the first phase of development.

2.22 The Phase 1 local centre is proposed to be primarily accessed from the north-west via Station Road (B1050). The positioning of the local centre further north increases its accessibility as a nearby shopping/service centre alternative for a number of neighbouring villages, as well as the Phase 1 population, to maximise local accessibility and passing car-borne trade. The accessibility by walking distances of 600 m and 1,000 m, derived from the AAP definitions of *"easy walking distances"*, has been plotted 'as the crow flies' onto the Phase 1 Illustrative Masterplan and Proposed Local Centre Walking Distance Map (Appendix 5).

2.23 The Phase 1 Illustrative Masterplan and Proposed Local Centre Walking Distance Map demonstrates that the majority of the residential properties (around 75%) forming Phase 1 are within 600m walking distance from the local centre, with all residential development within 1,000m. The areas that fall outside the 600m will be within easy walking distance of the town centre, once developed. Around 75% of the developed area of Longstanton is within 1,000m of the Northstowe Phase 1 local centre.

Summary

2.24 The framework masterplan revises the neighbourhood and centre structure for Northstowe, including an enlarged Local Centre for the Phase 1 neighbourhood development, in response to policy objectives on meeting needs, accessibility, local point, sustainability and self-efficiency.

2.25 Despite the 2011 update to the 2007 Northstowe masterplan, a number of similarities remain that should be considered fundamental to the scale of Phase 1. The 2007 masterplan indicated that Local Centre A would be the most northern in the centre hierarchy, would be the largest of the local centres, and, would be built in advance of the town centre.

2.26 The illustrative masterplan for Phase 1 maintains these characteristics for the first of the two local centres (rather than five). Its importance to community development is heightened by its significance as a focal point for a larger neighbourhood and catchment, as the principal shopping and service centre for many years in advance of realising the town centre.

3.0 Local Centre Guidance and Comparables

3.1 Prior to assessing the quantitative and qualitative need for the proposed Northstowe Phase 1 local centre, we consider it is first relevant to review national guidance on local centres and Cambridge's market towns to establish whether there are any broad indicators of the appropriate nature and scale of local centre for the first phase of Northstowe's development.

National Planning Policy

3.2 PPS4: Planning for Sustainable Economic Growth, published on 29 December 2009, sets out the Government's policies for economic development. Annex B of PPS4 defines local centres as follows:

"Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre."

3.3 The CLG Practice Guidance on Need, Impact and the Sequential Approach (2009) states (para. 6.18) that proposals within planned new centres can pose problems of interpretation. As required by national policy, new centres should be considered through the Regional Strategy (RS)/Local Development Framework (LDF) process, which should include considering the appropriateness of new centres, (1) the scale and form of development likely to be appropriate (including the need for floorspace thresholds) and (2) other matters such as the impact on the existing hierarchy and networks of centres. Importantly, the Guidance states that where the need is identified to create a new centre, and the appropriate policy tests are met, it will not be necessary to apply a sequential approach to consider whether proposals planned within the new centre could be met in nearby existing centres.

3.4 The Practice Guidance expands on the requirement to assess scale, which will involve considering:

- whether a proposal is consistent with the role and function of the town centre and its catchment, as specified in the network or hierarchy set out in the relevant RS/LDF.
- the consistency or otherwise of the scale of any proposal with similar facilities at other centres at a similar level in the retail hierarchy; and
- the scale of the proposal itself relative to similar retail developments in those centres (para. 7.33).

3.5 The Guidance states that an indicator of the appropriateness of a proposal's scale is whether there is a demonstrable need based upon current/forecast expenditure and current market shares. Where a significant increase in market share, and/or an extension of the town centre catchment area is required to support the scale and form of development proposed, it may be relevant to consider the impact of such an increase on neighbouring centres (para. 7.35).

3.6 It will also be necessary to consider other issues related to scale, such as the accessibility of the proposal to its intended catchment, its effect on overall travel patterns, and consistency with the network and hierarchy and overall planning strategy for an area (para. 7.36).

Cambridgeshire Market Towns

3.7 The existing Cambridgeshire market towns are the most relevant guide in terms of what the full Northstowe scheme can be compared against in a sub-regional context. The market towns, as designated in their respective development plans (and previously in the East of England Plan 2008 and Cambridge & Peterborough Structure Plan 2003), generally comprise a scale of retail provision to cater for the town population as well as the shopping needs of outlying villages.

3.8 The North West Cambridge Supplementary Retail Study (NLP, 2010 para 2.41), estimated the total convenience floorspace for the 2007 masterplan of 6,625 sq.m net (5,525 sq.m net from the town centre and 1,100sq.m net from the 5 local centres). Thus, the framework masterplan, once built out, would equate to a similar (if not larger) geographical size and population to the existing market towns of Huntingdon, St Ives, March and Wisbech as identified in Table 3.1 below.

Table 3.1 Cambridgeshire Market Towns

Cambridgeshire Market Town	Population (2005)	Approx. Convenience Floorspace (sq.m net)
St Neots	26,180	4,950
Wisbech	20,460	8,381
March	20,080	3,917
Huntingdon	19,940	7,860
Ely	17,200	6,546
St Ives	15,770	3,335
Whittlesey	15,740	1,000
Chatteris	9,480	1,698
Average	**18,106**	**4,711**
Northstowe (2007)	22,800 (est.)	6,625 (est.)

3.9 As depicted above, once complete, Northstowe would rank second amongst the Cambridgeshire market towns in terms of population, and third in its retail provision. Thus, Northstowe 2007 would broadly correlate with the population and convenience floorspace provision of Cambridgeshire's market towns.

3.10 Our analysis of the retail and settlement hierarchy throughout the Cambridgeshire area has revealed that very few local centres exist with a similar profile to Northstowe Phase 1, the exceptions being Brampton and Godmanchester on the outskirts of Huntingdon. The designated *"key service centres"* of Brampton and Godmanchester have populations of 5,000 and 6,000 respectively, similar to the combined population of Northstowe Phase 1 and the connected village of Longstanton (total 5,820, see Tables 4.1 and 5.2 of this report). Co-op convenience stores can be found in both of these key service centres, the first in Brampton 140 sq.m net, the second in Godmanchester 360 sq.m net.

3.11 Although the population of Brampton and Godmanchester are similar to Northstowe Phase 1, judging by the small convenience floorspace provision, there is an obvious reliance on Huntingdon (both town centre and out of centre retail provision) as a main shopping destination. This is to be expected due to the natural settlement growth of Huntingdon and its outlying villages, whereby retail provision in the outlying neighbourhoods has developed at a later stage through the traditional evolution and expansion of the local centres to complement the town centre provision.

3.12 Traditionally, the pattern and hierarchy of centres, particularly local centres, has evolved through population growth and expansion – as exampled above with Huntingdon's supporting key service centres of Brampton and Godmanchester. The situation at Northstowe is different in that the first local centre within Phase 1 is to be developed in advance of the main town centre. The proposed local centre at Northstowe Phase 1 is location specific and needs to meet the objectives set out in the planning policy framework, specifically the AAP, in providing sustainable, local shopping facilities to serve the new population.

Summary

3.13 PPS4 Practice Guidance indicates that the scale of centres is to be determined by their role, function, retail needs, accessibility and comparability to similar provision.

3.14 There are no local centre comparators within Cambridgeshire's market towns that bear resemblance to the Phase 1 local centre proposed for Northstowe, primarily as a result of the phased delivery of the new settlement being the reverse of that experienced by Cambridgeshire historic market towns.

3.15 The Phase 1 local centre ought to be larger in scale than the very small scale existing village centre retail provision, in order to be more self sufficient in meeting the food shopping needs of the new residential neighbourhood, and to provide Longstanton, other nearby villages and the employees within the new business development with a more convenient and accessible supermarket than is presently available.

4.0 Northstowe Phase 1 Role and Catchment Area

Role

4.1 It is intended that the new local centre and facilities within Northstowe Phase 1 will be developed to fit within the existing local and regional retail hierarchy. The intention is for the local centre to be as sustainable as possible, retaining a higher proportion of day to day and food shopping trips than is the case with traditional village centres in the absence and in advance of a new town centre at Northstowe. It is not intended to provide a retail centre that will compete with market town centres, but instead it is to perform a complementary and subsidiary role.

Catchment Area

4.2 Primary and secondary catchment areas have been defined for the proposed local centre (see the Catchment Area, Centre Hierarchy and Foodstore Provision Map, Appendix 6). The catchment areas are based on ward boundaries, and have been defined to take into account the existing distribution of centres and food stores/shops in the local area as well as the road network. Ward boundaries were considered the most appropriate basis for the catchment area definition, as these provided a better fit with settlement geography than postcode sectors, when considering the distribution of existing facilities in the local area.

4.3 The primary catchment area comprises the Longstanton ward, and includes Longstanton village and Northstowe. The secondary catchment area comprises the Cottenham, Swavesey and Willingham & Over wards. This includes the villages of Cottenham, Oakington, Rampton, Willingham, Over and Swavesey. The secondary catchment area has been split into two zones – east and west. A distinction has been made between the east and west secondary catchment area, as the existing road network makes accessibility to Northstowe from the west easier.

4.4 For comparison, we have also examined existing off-peak drive times to identify which centres are within a 5 and 10 minute drive from the proposed local centre (See Drivetime Map, Appendix 7). In comparison with our defined catchment area, the 10 minute drive time excludes Cottenham but includes Bar Hill. Little change to drive times to other villages is expected, once Northstowe new roads are in place. We consider that a ward based defined catchment area is appropriate to use as the basis for this assessment, as Bar Hill should be excluded from the catchment given it is more than self sufficient in shopping provision, whereas Cottenham is not.

Existing Centre Hierarchy

4.5 The South Cambridgeshire Core Strategy (adopted January 2007) (Policy ST/9) identifies the retail hierarchy of centres as:

a Northstowe town centre;

b Cambridge East district centre;

c Rural Centres village centres (Histon/Impington);

d Other village centres (Minor Rural Centres – Bar Hill, Cottenham and Willingham, Group Villages – Longstanton, Oakington, Over and Swavesey and Infill Villages – Rampton).

4.6 The Core Strategy identifies Northstowe as a proposed town centre in the centre hierarchy, and notes Rural Centres are the appropriate location for shopping to serve their local catchment area only. Minor Rural Centres, Group Villages and Infill Villages, which serve even smaller catchment areas than Rural Centres, cater for very localised shopping needs.

4.7 It is anticipated that the new Phase 1 local centre will fit into the retail hierarchy beneath the new town centre at Northstowe, performing a hybrid role more akin to a *"rural centre"* serving its local catchment, like Sawston or Histon, until such time as Northstowe town centre is operational.

4.8 The existing hierarchy of settlements within the catchment area (Appendix 6) is summarised in Table 4.1.

Table 4.1: Existing settlement hierarchy in the Catchment Area

Settlement	South Cambridgeshire Classification	Parish Population (2005)
Cottenham	Minor Rural Centre	6,000
Willingham	Minor Rural Centre	3,720
Over	Group Village	2,790
Swavesey	Group Village	2,600
Longstanton	Group Village	1,860
Oakington & Westwick	Group Village	1,250
Rampton	Infill Village	470

Source: LDF Evidence Base: Cambridgeshire Population & Dwelling Stock Estimates 91-2005

Existing Convenience Shopping Provision

4.9 The existing retail provision in the catchment area is typified by small scale convenience in the rural villages, with slightly larger stores and services in the minor rural centres. This is reflected in the designated South Cambridgeshire settlement hierarchy. Table 4.2 identifies the existing convenience retail facilities within the catchment area, based on information obtained from our Village Shops Survey (November 2011, Appendix 8) and from the Institute of Grocery Distribution (IGD, 2009).

4.10 Identification of the existing convenience provision was conducted in three stages. Firstly, an 'at desk' street view search of the settlements to identify existing provision, coupled with a review of the Cambridge Sub Region Retail

Study (2008). Secondly, a cross reference with the IGD directory was conducted to reconcile the previously mentioned provision. Thirdly, we visited each village within the catchment area. This shop survey sought to update our understanding of the retail provision in the area and, in particular, the convenience shopping elements. The visit also included the Tesco Extra and other shops at Bar Hill.

Table 4.2: Existing convenience goods shops in the Catchment Area

Village	Shop	Sales Area sq.m net	Convenience Sales Area sq.m net
Longstanton	Village Store/Post Office	42	40
Longstanton Sub-Total		**42**	**40**
Oakington	Village Store/Post Office	41	39
Oakington Sub-Total		**41**	**39**
Willingham	Co-op	225	203
Willingham	One Stop Shop	133	126
Willingham	Bakery	14	14
Willingham Sub-Total		**372**	**343**
Over	Newsagent/Post Office	39	37
Over Sub-Total		**39**	**37**
Swavesey	Costcutter	75	71
Swavesey	Newsagent	13	12
Swavesey Sub-Total		**88**	**83**
Cottenham	Co-op	279	251
Cottenham	Newsagents	37	35
Cottenham	Fruit & Veg	23	22
Cottenham	Butchers	20	20
Cottenham	Bakery	26	26
Cottenham	Mace	61	58
Cottenham Sub-Total		**446**	**412**
Total		**1,028**	**954**

4.11 In addition, the villages are supported by a Co-op pharmacy (Cottenham) and contain retail services including post offices (Willingham, Swavesey and Cottenham), a coffee shop (Cottenham) and various farm shops selling local produce.

4.12 Outside of the catchment area:

- Bar Hill to the southwest contains a large Tesco Extra store (15,215 sq.m gross/9,392 sq.m net sales);
- Histon/Impington to the south east has a Tesco Express (422 sq.m gross/202 sq.m net sales) and a Co-op Food (262 sq.m gross/185 sq.m net sales) respectively;

- Larger format stores at Cambourne (Morrisons, 2,800 sq.m net) and Milton (Tesco, 2,330 sq.m net) have a notable pull in terms of main food shopping further out of the catchment area;
- Additional outlying food stores are also situated at Needingworth and St Ives and there is a wide range of provision within Cambridge City.

Existing Shopping Patterns

4.13 The Cambridge City Council and South Cambridgeshire District Council Cambridge Sub-Region Retail Study, prepared by GVA Grimley in October 2008, provides an assessment of the existing retail facilities and shopping patterns within the sub-region informed by a household (telephone) survey undertaken in April 2008 (see extract, Appendix 9).

4.14 In terms of the existing trading performance of the convenience floorspace in South Cambridgeshire, the Study identifies (para. 10.27) that *"all of the other foodstores which anchor the more traditional rural centres are performing very well [with the exception of Spar, Sawston] … the strong performance of these stores can be attributed to their vital role as locations for everyday provisions."* This comment includes the Tesco Express in Histon, which is trading at approximately 46% above company average and the large out of centre Tesco at Bar Hill is estimated to be trading slightly above company average. Northstowe is located within zone 4 of the GVA Study catchment area. Within this zone, Tesco at Bar Hill attracts 45% of the convenience goods market share (GVA Table 12, Appendix 9).

4.15 The Northstowe Retail Capacity and Impact Report (DTZ, December 2007) which accompanied the Northstowe 2007 outline planning application was also informed by a household survey, undertaken in October 2006. As this Study assessed the proposals for Northstowe at that time, primarily the town centre, a wider catchment was defined (see extract, Appendix 10). The "Core Zone" most closely reflects the catchment area defined for Northstowe Phase 1, but also includes Bar Hill, Girton and Histon/Impington. The Study identifies that the Tesco at Bar Hill dominates the convenience goods spending patterns of residents within the Core Zone, accounting for a 50% market share, split into 58% market share for 'main food' shopping and a 8.5% 'top-up' share (para. 8.12).

4.16 The principal village centres of Cottenham, Willingham and Histon combined account for 18% of the market, which is primarily directed towards the Co-op in Cottenham and the Tesco Express in Histon (para. 8.14). The Study suggests that the local food shops in the principal villages are geared to catering for the top-up needs of their respective local populations and attract little trade from further afield (para. 10.49). Local shops have a 6% market share within the Core Zone (Table 8.3). The Study notes that the smaller villages generally contain only a few small shops, normally convenience stores and post offices, serving a walk-in catchment population and entirely dependent on local expenditure (para. 4.33).

4.17 Both of these studies clearly indicate the influence of the Tesco at Bar Hill on existing shopping patterns, and the localised nature and attraction of current convenience goods retail provision within the catchment area of Northstowe Phase 1.

Summary

4.18 The Northstowe Phase 1 local centre is intended to have a more sustainable and self-sufficient role than that of existing village shops and in the absence of Northstowe town centre.

4.19 Its catchment area has been defined and split into the primary catchment area, which includes Longstanton village and Northstowe (broadly 5 minutes drive time), and the secondary catchment area which includes the villages of Cottenham, Oakington, Rampton, Willingham, Over and Swavesey (broadly 10 minutes drive time).

4.20 Existing retail provision within the catchment area villages is limited to very small scale, localised shopping facilities, primarily convenience shops and services serving a ‘walk-in’ catchment.

4.21 Existing shopping patterns within the catchment area are dominated by the influence of the large Tesco Extra store at Bar Hill, to the south west of the catchment area, which attracts around half of all convenience shopping spend in the Northstowe catchment, with village centre shops collectively retaining just 20% convenience spending.

5.0 # Retail Capacity Assessment

Methodology

5.1 A retail capacity assessment has been undertaken in order to establish the amount of convenience and comparison goods floorspace that could be accommodated within the proposed local centre at Northstowe Phase 1.

5.2 The methodology that we have adopted is a standard staged approach, consistent with the PPS4 Practice Guidance, comprising:

1. identify the amount of expenditure currently available to shopping facilities within the catchment area, based on population and average expenditure per capita information;
2. project available expenditure into the future, taking into account population change, growth in average expenditure per capita and forecast changes in shopping patterns;
3. estimate the appropriate “benchmark” or “equilibrium” turnover of existing retail facilities based on sales floorspace and an appropriate average sales density for existing floorspace;
4. estimate the proportion of available expenditure that will be retained in the catchment area that will be available to support retail floorspace in the local centre;
5. convert available surplus expenditure into potential new floorspace based on assumed average sales densities for new floorspace. This also seeks to provide an appropriate balance and mix of different types of retail floorspace in order to meet any qualitative deficiencies in existing provision.

Catchment Population

Existing Population

5.3 The existing population within the primary and secondary catchment areas has been obtained from Experian for 2010, 2016 and 2021, the year that Northstowe Phase 1 should be completed.

Table 5.1: Existing Population

	2010	2016	2021
Primary Catchment Area	2,448	2,737	2,909
Secondary Catchment Area East	7,531	8,343	8,809
Secondary Catchment Area West	8,941	9,893	10,471
Total	**20,930**	**22,989**	**24,210**

Northstowe Phase 1 Population

5.4 The Report assumes that by 2021, all 1,500 houses proposed as part of Phase 1 will have been constructed and occupied. Based on the Cambridge Econometrics Updated Demographic Projections for Northstowe (6 May 2011) this gives a total population in 2021 of **3,960**.

Table 5.2: Proposed Population

	2016	2021
Number of house completions	550	1,500
Total Population	**1,535**	**3,960**

5.5 Table 5.3 summarises the total combined existing and proposed population within the catchment area.

Table 5.3: Total Population

	2010	2016	2021
Northstowe Phase 1	-	1,535	**3,960**
Primary Catchment Area	2,448	2,737	2,909
Primary Catchment Area Sub-Total	**2,488**	**4,272**	**6,869**
Secondary Catchment Area East	7,531	8,343	8,809
Secondary Catchment Area West	8,941	9,893	10,471
Secondary Catchment Area Sub-Total	**18,442**	**20,252**	**21,301**
Total	**20,930**	**24,524**	**28,170**

Available Expenditure

5.6 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for convenience goods for the catchment area for the year 2010 have been obtained. All figures are in 2010 prices.

5.7 Experian's latest national expenditure projections have been used to forecast expenditure growth between 2010 and 2021. Appendix 11 sets out the data assumptions that have been adopted.

Convenience Goods Expenditure

5.8 Table 5.4 identifies the available convenience goods expenditure per person.

Table 5.4: Available convenience goods expenditure per person

£	2010	2016	2021
Primary Catchment Area	£1,945	£1,928	£1,974
Secondary Catchment Area East	£2,021	£2,004	£2,051
Secondary Catchment Area West	£1,999	£1,982	£2,028

5.9 We have assumed that the new population at Northstowe will generate the same expenditure per capita as the primary catchment area. Table 5.5 below identifies the total available convenience goods expenditure generated by the existing and proposed population within the catchment area.

Table 5.5: Total Available convenience goods expenditure (existing and proposed population)

£m	2010	2016	2021
Northstowe Phase 1	-	£2.96	£7.82
Primary Catchment Area	£4.76	£5.28	£5.74
Primary Catchment Area Sub-Total	**£4.76**	**£8.24**	**£13.56**
Secondary Catchment Area East	£15.22	£16.72	£18.07
Secondary Catchment Area West	£17.87	£19.61	£21.24
Secondary Catchment Area Sub-Total	**£33.09**	**£36.32**	**£39.31**
Total	**£37.85**	**£44.56**	**£52.86**

Comparison Goods Expenditure

5.10 Table 5.6 identifies the available comparison goods expenditure per person.

Table 5.6: Available comparison goods expenditure per person

£	2010	2016	2021
Primary Catchment Area	£3,027	£3,442	£4,274
Secondary Catchment Area East	£3,197	£3,636	£4,515
Secondary Catchment Area West	£3,282	£3,733	£4,635

5.11 We have assumed that the new population at Northstowe will generate the same expenditure per capita as the primary catchment area. Table 5.7 below identifies the total available comparison goods expenditure generated by the existing and proposed population within the catchment area.

Table 5.7: Total Available comparison goods expenditure (existing and proposed population)

£m	2010	2016	2021
Northstowe Phase 1	-	£5.28	£16.93
Primary Catchment Area	£7.41	£9.42	£12.43
Primary Catchment Area Sub-Total	**7.41**	**£14.70**	**£29.36**
Secondary Catchment Area East	£24.08	£30.34	£39.77
Secondary Catchment Area West	£29.34	£36.93	£48.53
Secondary Catchment Area Sub-Total	**53.42**	**£67.27**	**£88.31**
Total	**£60.83**	**£81.97**	**£117.67**

Turnover of Existing Convenience Shops in Catchment Area

5.12 Table 5.8 provides an estimate of the likely turnover of the existing convenience retail facilities within the catchment area, as identified in Section 3, adopting an average turnover for the stores.

Table 5.8: Existing convenience goods shops in the Catchment Area

Village	Shop	Convenience Sales Area sq.m net	Sales Density £/sq.m net	Turnover £m
Longstanton	Village Store/Post Office	40	3,500	0.14
Longstanton Sub-Total		**40**	**-**	**0.14**
Oakington	Village Store/Post Office	39	3,500	0.14
Oakington Sub-Total		**39**	**-**	**0.14**
Willingham	Co-op	203	8,959	1.81
Willingham	One Stop Shop	126	3,500	0.44
Willingham	Bakery	14	3,500	0.05
Willingham Sub-Total		**343**	**-**	**2.30**
Over	Newsagent/Post Office	37	3,500	0.13
Over Sub-Total		**37**	**-**	**0.13**
Swavesey	Costcutter	71	3,500	0.25
Swavesey	Newsagent	12	3,500	0.04
Swavesey Sub-Total		**83**	**-**	**0.29**
Cottenham	Co-op	251	8,959	2.25
Cottenham	Newsagents	35	3,500	0.12
Cottenham	Fruit & Veg	22	3,500	0.08
Cottenham	Butchers	20	3,500	0.07

Village	Shop	Convenience Sales Area sq.m net	Sales Density £/sq.m net	Turnover £m
Cottenham	Bakery	26	3,500	0.09
Cottenham	Mace	58	3,500	0.20
Cottenham Sub-Total		**412**	**-**	**2.81**
Total		**954**	**-**	**5.81**

5.13 The total convenience goods turnover of retail facilities within the catchment area is estimated to be £5.81 million, almost half of which is at the Co-op's Cottenham store, with the remaining £3 million shared amongst 13 shops.

Convenience Goods Spending Retained in Local Centre

5.14 A local centre is proposed within Northstowe Phase 1, and any retail provision is therefore likely primarily to cater for "top-up" shopping, however the local centre may also provide for some "main" food shopping needs. In the short term, and in advance of proposals for the remainder of Northstowe coming forward, which will include a town centre anchored by a superstore, it is appropriate to plan for the Phase 1 local centre to provide a viable retail destination that will help Phase 1 to be as self-sufficient as practicable to do so.

5.15 The Cambridge City Council and South Cambridgeshire District Council Cambridge Sub Region Retail Study (GVA Grimley, October 2008) applies a main to top-up split of 75% to 25%. Tables 5.9 and 5.10 below summarise the amount of main and top-up expenditure available in the primary and secondary catchment areas.

Table 5.9: Main convenience goods expenditure

£m	2010	2016	2021
Northstowe Phase 1	-	£2.22	£5.86
Primary Catchment Area	£3.57	£3.96	£4.31
Secondary Catchment Area East	£11.42	£12.54	£13.55
Secondary Catchment Area West	£13.40	£14.71	£15.93
Total	**£28.39**	**£33.42**	**£39.65**

Table 5.10: Top-up convenience goods expenditure

£m	2010	2016	2021
Northstowe Phase 1	-	£0.74	£1.95
Primary Catchment Area	£1.19	£1.32	£1.44
Secondary Catchment Area East	£3.81	£4.18	£4.52
Secondary Catchment Area West	£4.47	£4.90	£5.31
Total	**£9.46**	**£11.14**	**£13.22**

5.16 However, it is important to note that not all of this expenditure will be available to support retail facilities in the local centre at Northstowe Phase 1 as the centre will fit into the existing retail hierarchy, with expenditure continuing to be attracted to other centres and existing superstores.

5.17 In order to inform our assumptions in relation to the level of expenditure the Northstowe local centre could retain, we have reviewed the Cambridge City Council and South Cambridgeshire District Council Cambridge Sub-Region Retail Study prepared by GVA Grimley in 2008. This report assessed the market share of stores within South Cambridgeshire. While not directly comparable, as GVA's zones were much larger than the zones we have identified for Northstowe, we note that Budgens in Sawston (a village to the south of Cambridge) attracted 6% of the available convenience goods expenditure within its "home" zone (Appendix 9, GVA Table 10,). This equates to around £2.7 million of Budgens' turnover.

5.18 Sawston is defined as a rural centre in the South Cambridgeshire Core Strategy, and is the largest rural centre in South Cambridgeshire. The convenience offer of the centre is anchored by the Budgens store, but also has a Spar and a number of independent retailers, together with a range of services (Appendix 9, GVA paras 7.16/17 and table 7.1). Although there are a higher number of retailers in Sawston than may eventually occupy Northstowe Phase 1 local centre, it is a useful comparable in terms of catchment population and its role within the retail hierarchy.

5.19 We have also reviewed a household survey undertaken for the Breckland Retail and Town Centre Study (Appendix 12) in May 2010 on behalf of Breckland Council, a rural local authority to the north east of Cambridge which has some similarities in terms of its settlement structure and retail provision. This survey was conducted on an individual postcode sector basis and therefore allows much finer analysis of existing shopping patterns. The survey area extended beyond the boundaries of Breckland to include parts of adjoining authorities, including Forest Heath.

5.20 As a case study for comparison with Northstowe, we have assessed Lakenheath (in Suffolk), which is a defined local centre in the Forest Heath Core Strategy. The Forest Heath Retail and Town Centre Study and Location Plan (Appendix 12), identify Lakenheath and its retail provision. The largest convenience shop within Lakenheath centre is a Co-op store, with a net sales area of 232 sq.m (Source: IGD, 2009), supported by a range of shops and facilities including newsagents, toy shop, hairdressers, post office, bank, take away, opticians, library and pubs. Lakenheath's "home" postcode sector, IP27 9, has an estimated population of 10,152 in 2010, which is forecast to increase to 10,578 in 2016 and 11,239 by 2021. In comparison, the population of the Northstowe Phase 1 Primary Catchment Area in 2016 is estimated at 4,272 (40% of the population of IP27 9) and 6,998 in 2021 (62% of the population of IP27 9).

5.21 IP27 9 extends towards the higher order centre of Mildenhall to the south west, which contains a Sainsburys (943 sq.m net) and Co-op (554 sq.m net), and

Brandon to the north east, which contains a Tesco (1,005 sq.m net). Mildenhall and Brandon are both defined in town centres in the Forest Heath Core Strategy, and these centres have an influence on shopping patterns for residents within IP27 9, particularly in relation to "main" food shopping.

5.22 Within its "home" postcode sector, Lakenheath retains 49.7% of "top-up" convenience goods expenditure and 3.1% of "main" convenience goods expenditure (based on the assumption that convenience goods expenditure is split so that "last" main shop equates to 50%, "other" main shop is 25%, "last" top-up shop is 17% and "other" top-up is 8%).

5.23 In Section 7 of this report, we review urban expansion/new settlement schemes to compare the level of retail provision with Northstowe Phase 1. While none of these examples is directly comparable in terms of the size of new settlement, they provide a useful point of reference. In terms of assessment of expenditure retention, we note the following:

- **Buckshaw Village New Town, Chorley** (estimated population: 10,000) – assumes 75% of convenience expenditure retained in the primary catchment area and 20% from secondary catchment area (see para. 7.5);
- **Whitehill Bordon Eco Town, Hampshire** (estimated population: 9,400) – assumes 48% of convenience expenditure retained in its 'home' zone (see para. 7.7).

5.24 Informed by analysis of the studies noted above, and applying our judgement to the Northstowe context, Table 5.11 below estimates the proportion of main and top-up convenience goods expenditure that we believe could be retained within the primary and secondary catchment area to support a new local centre at Northstowe.

Table 5.11: Retained convenience goods expenditure

%	Main	Top-up
Northstowe Phase 1	25%	75%
Primary Catchment Area	15%	50%
Secondary Catchment Area East	5%	25%
Secondary Catchment Area West	2%	10%

5.25 Given the existing provision in the surrounding area and the lack of a critical mass of population to support a medium/large food store, we consider that these are relatively high retention levels and may be optimistic. However, this reflects the fact that top-up convenience shopping in particular can be carried out locally where appropriate facilities are provided but will also take place in various other locations, for example close to where people work or "pass by" journeys from elsewhere. Tables 5.12 and 5.13 identify the main and top-up retained expenditure i.e. that are available to support retail floorspace within the local centre.

Table 5.12: Retained main convenience goods expenditure

£m	2016	2021
Northstowe Phase 1	£0.55	£1.47
Primary Catchment Area	£0.59	£0.65
Secondary Catchment Area East	£0.63	£0.68
Secondary Catchment Area West	£0.29	£0.32
Total	**£2.07**	**£3.11**

Table 5.13: Retained top-up convenience goods expenditure

£m	2016	2021
Northstowe Phase 1	£0.55	£1.47
Primary Catchment Area	£0.66	£0.72
Secondary Catchment Area East	£1.04	£1.13
Secondary Catchment Area West	£0.49	£0.53
Total	**£2.75**	**£3.84**

5.26 We have additionally made an allowance for a small amount of inflow from shoppers who may combine shopping with a trip to the centre for another purpose, passing trade. This also takes into account employees working in the employment areas and other services, facilities and businesses within Northstowe Phase 1 who will use the local centre but live outside the catchment area.

5.27 It is difficult to judge the amount of inflow of expenditure from beyond the catchment area, particularly “pass by” trade. Pass by trade is likely to mostly comprise those passing to and from the A14. To keep the calculations simple, we have estimated that the amount of inflow equates to 10% of the ‘top-up’ spending that is retained in the local centre.

5.28 As a sensitivity test, we have estimated the likely spend of employees who live outside of the catchment area. We understand approximately 450 employees will work in Northstowe Phase 1 but live elsewhere. If we assume approximately the same average expenditure per capita as for residents within the primary catchment area, in 2021 these employees would generate around £0.9 million available convenience goods expenditure. If we then assume that 10% of ‘main’ and 50% of ‘top-up’ spending of these employees is spent within Northstowe, this would equate to just under £0.2 million of ‘inflow’ to the local centre. This suggests that our estimate of £0.38 million inflow in 2021, as set out in Table 5.14 is reasonable, allowing for additional pass-by trade.

5.29 Table 5.14 below provides a summary of the available convenience goods expenditure to support retail floorspace within the local centre, based on the assumptions above.

Table 5.14: Total retained convenience goods expenditure

£m	2016	2021
Main	£2.07	£3.11
Top-up	£2.75	£3.84
Inflow (10% of Top-up)	£0.27	£0.38
Total	**£5.09**	**£7.34**

5.30 Depending on the final configuration of the local centre, this will affect the retention rates. It should also be noted that the above assumptions and retention rates will vary depending upon the final retail offer and mix within the local centre and the evolution of the masterplan for Northstowe.

5.31 By way of comparison, the convenience goods expenditure that the above assessment estimates could be retained within the local centre in 2021 is £7.34 million, which compares to the total convenience goods expenditure generated by the new population at Northstowe of £7.82 million in 2021 (see Tables 5.9 and 5.10). The estimated convenience turnover of the Phase 1 local centre is therefore similar to the total convenience expenditure generated by the new population of Phase 1.

Convenience Goods Retail Floorspace Requirements

5.32 For the purposes of this assessment, we have assumed that all of the retained expenditure identified above is located within a single convenience goods store.

5.33 We have assessed two turnover scenarios for the retail floorspace, to provide a range of floorspace estimates for the local centre. Taking an average of the "main" supermarket operators (i.e. Asda, Morrisons, Sainsbury's, Tesco and Waitrose), this gives an average turnover of £12,500 per sq.m. We have also assessed a "discount" food store, using an average turnover of £6,200 per sq.m (based on the average of Aldi, Lidl and Netto turnovers). (NB. We have assumed a net:gross floorspace ratio of 70% and have not made an allowance for any increase in turnover efficiency).

5.34 Table 5.15A and 5.15B identify the potential convenience goods floorspace that could be supported in 2016 and 2021 using both turnover scenarios. A supermarket would have an element of comparison goods floorspace, assumed here to be 10% of the net floorspace, which would increase the overall size of the store.

Table 5.15A Potential Convenience Goods Floorspace Requirements – High Turnover

	2016	2021
Total Available Expenditure £m	£5.09	£7.34
Turnover £/sq.m	£12,500	£12,500
Convenience Floorspace sq.m net	407	587
Comparison Floorspace sq.m net	45	65
Local Centre Supermarket sq.m net	**452**	**652**
Local Centre Supermarket sq.m gross	**645**	**932**

Table 5.15B: Potential Convenience Goods Floorspace Requirements – Low Turnover

	2016	2021
Total Available Expenditure £m	£5.09	£7.34
Turnover £/sq.m	£6,200	£6,200
Convenience Floorspace sq.m net	821	1,184
Comparison Floorspace sq.m net	91	131
Local Centre Supermarket sq.m net	**912**	**1,315**
Local Centre Supermarket sq.m gross	**1,303**	**1,879**

5.35 The above tables demonstrate that the local centre could support a small supermarket of between 452 and 912 sq.m net by 2016, and between 652 and 1,315 sq.m net by 2021.

5.36 The existing convenience retail facilities in the catchment area have a total turnover of £5.81 million (Table 5.5 above). We have assumed that there is no growth in turnover efficiency for existing convenience goods floorspace, and this figure therefore remains constant in 2016 and 2021. The combined convenience turnover of the existing retail facilities and the new local centre supermarket at Northstowe (Tables 5.8 and 5.14) would be £10.91 million in 2016, and £13.25 million in 2021.

5.37 The combined turnover of these existing and proposed facilities equates to 25% of total available convenience goods expenditure in the catchment area in both 2016 (£44.56 million, Table 5.5) and 2021 (£52.86 million, Table 5.5).

Comparison Goods Spending Retained in Local Centre

5.38 For comparison goods, we have assumed that a much lower proportion of available expenditure will be retained within the local centre. This recognises that while the scale of the local centre proposed within Northstowe Phase 1 is such as to justify an element of comparison shopping, consistent with the role of a local centre, the centre would not offer the full range of higher order comparison shopping provided by centres at the upper end of the retail hierarchy. This retention rate takes account of the offer of existing centres and settlements in the area, in particular Cambridge. Importantly, the level of expenditure retention emphasises that the proposed comparison goods offer of the local centre will be complementary to the existing offer within Cambridge, and the town centre in Northstowe that will be developed at a later stage.

5.39 Household survey data is less useful in seeking to establish comparison shopping patterns for smaller centres as the results tend to favour higher order centres as the last/other destinations for most categories of comparison goods. Table 5.16 below identifies the split between spending per person on categories of comparison goods, which has been obtained from Experian for the Primary Catchment Area. The highlighted categories are those which are more likely to be represented in a local centre. We would expect higher order categories, such as clothing and electrical goods to be very limited in a local centre, as residents would travel to larger centres (such as Cambridge) to meet these comparison shopping requirements.

Table 5.16 Split of Comparison Goods Expenditure by goods category per person

Goods Category	%
Clothing materials and garments	21.80
Games, toys and hobbies; sport and camping; musical instruments	11.42
Appliances for personal care	9.68
Furniture and furnishings; carpets and other floor coverings	9.63
Audio-visual, photographic and information processing equipment	7.49
Materials for maintenance and repair of the dwelling	4.13
Books and stationery	3.85
Shoes and other footwear	3.40
Household textiles	3.06
Major household appliances (electric or not)	3.01
Recording media	2.81
Jewellery, clocks and watches	2.80
Medical goods and other pharmaceutical products	2.63
Small tools and miscellaneous accessories	2.42
Glassware, tableware and household utensils	2.22
Gardens, plants and flowers	2.21
Therapeutic appliances and equipment	1.84
Pets and related products	1.83
Bicycles	1.45
Other personal effects	1.28
Small electrical household appliances	0.51
Major tools and equipment	0.30
Non-Durable household goods	0.25
Total Comparison Goods Expenditure	**100.00**

5.40 The highlighted goods in Table 5.16 that may typically be found in a local centre account for a total of around 25% of available comparison goods expenditure per person. Clearly, we would not expect all of these goods categories to be represented in local centres, nor would we expect that anything other than a small proportion of the spending on any categories that are present within a local centre would be spent in that centre.

5.41 Based on the above consideration, and using our judgement, Table 5.17 below provides an estimate of the proportion of comparison goods expenditure that we believe could realistically be retained within the primary and secondary catchment area to support a new local centre at Northstowe.

Table 5.17: Retained comparison goods expenditure

%	Retained Expenditure
Northstowe Phase 1	10%
Primary Catchment Area	5%
Secondary Catchment Area East	2%
Secondary Catchment Area West	1%

5.42 We have also made an allowance for a small amount of inflow from shoppers who may combine shopping with a trip to the centre for another purpose, pass by trade, or for some people in immediately surrounding areas who will find these facilities convenient for local shopping.

5.43 Table 5.18 below provides a summary of the available comparison goods expenditure to support retail floorspace within the local centre, based on the assumptions above.

Table 5.18: Total retained comparison goods expenditure

£m	2016	2021
Northstowe Phase 1	0.53	1.69
Primary Catchment Area	0.47	0.62
Secondary Catchment Area East	0.61	0.80
Secondary Catchment Area West	0.37	0.49
Inflow (5%)	0.10	0.19
Total	**2.08**	**3.78**

Comparison Goods Retail Floorspace Requirements

5.44 An average turnover of £4,000 per sq.m in 2011 has been assumed for the comparison goods floorspace. Assuming a growth in turnover efficiency of 1.7% per annum from 2013, this equates to £4,207 per sq.m in 2016 and £4,577 per sq.m in 2021. We have also assumed a net:gross floorspace ratio of 75%.

Table 5.19 identifies the potential comparison goods floorspace that could be supported in 2016 and 2021.

Table 5.19 Potential Comparison Goods Floorspace Requirements

	2016	2021
Total Available Expenditure £m	2.08	3.78
Turnover £/sq.m	£4,207	£4,577
Local Centre Comparison Floorspace sq.m net	**494**	**826**
Local Centre Comparison Floorspace sq.m gross	**659**	**1,101**

5.45 The above table demonstrates that the local centre could support 494 sq.m net/659 sq.m gross of comparison goods floorspace by 2016, and 826 sq.m net/1,101 sq.m gross by 2021. However, it should be noted that an element of this comparison goods floorspace will be located within the supermarket, and depending on the operator of the supermarket, this will account for between 45-91 sq.m net in 2016 and between 65-131 sq.m net in 2021 (Tables 5.15A and 5.15B).

Summary and Masterplan Implications

5.46 The retail capacity assessment has been undertaken to provide a broad indication of the level of supermarket floorspace that could be supported by local spending within the proposed local centre at Northstowe Phase 1.

5.47 The assessment demonstrates that, by 2016, the local centre could support:

- a small supermarket of between 452 and 912 sq.m net; and
- 494 sq.m net comparison goods floorspace.

5.48 By 2021, the local centre could support:

- a small supermarket of between 652 and 1,315 sq.m net; and
- 826 sq.m net comparison goods floorspace.

5.49 We estimate the likely site size requirements for the different types of foodstore operators in Table 5.20, informed by different supermarket operators' stores and requirements.

Table 5.20 Site Size Requirements

RETAILER	SQ.M NET	SQ.M GROSS	CAR PARKING	SITE SIZE
Major, e.g. Tesco, Sainsburys	660	1,000	80	0.5 ha
Mid, e.g. Co-op, Budgens	1,000	1,400	100	0.6 ha
Discounter, e.g. Lidl, Aldi	1,300	1,900	135	0.7 ha

5.50 Based on this assessment, the Masterplan should set aside between 0.5 and 0.7 ha to accommodate the supermarket.

6.0 Supermarket Qualitative Assessment

6.1 The PPS4 Practice Guidance on Need, Impact and the Sequential Approach acknowledges that assessing qualitative need is a subjective concept, but identifies (para. 3.10) five factors that are frequently used to assess qualitative need, as follows:

1. Deficiencies or ‘gaps’ in existing provision;
2. Consumer choice and competition;
3. Overtrading, congestion and overcrowding of existing stores;
4. Location specific needs such as deprived areas and underserved markets; and
5. The quality of existing provision.

Deficiencies/Gaps in Existing Retail Provision

6.2 Existing retail provision within the catchment area is very limited (as explained in Section 5 above), with the principal food store provision being two small Co-op stores in Willingham and Cottenham. Within the primary catchment area, the only convenience retail facility is a small village store/post office at Longstanton. Existing shopping patterns are dominated by the Tesco Extra store at Bar Hill, outside the catchment area.

6.3 The GVA Study concluded (para. 12.1) that there is a good convenience store provision in Cambridge and South Cambridgeshire in qualitative terms. Para. 12.9 notes that there is a need for some further deep discounter provision in the Cambridge sub-region and the focus of this should, in the first instance, be the existing district, local and rural centres. GVA considered that the 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.

6.4 The proposed supermarket at the Northstowe Phase 1 local centre will address the current deficiency in the existing retail provision in the catchment area and will provide for the shopping needs of both the existing and proposed population.

Consumer Choice and Competition

6.5 Linked to the existing deficiency in retail provision within the catchment area, the proposed local centre at Northstowe Phase 1 will provide existing and proposed residents with increased choice in the provision of retail facilities, in a more sustainable location. The local centre will also provide a range of other shops and services, which will increase choice and competition for local residents.

Overtrading, Congestion and Overcrowding of Existing Stores

6.6 The Practice Guidance states that the extent to which the turnover of existing stores significantly exceeds benchmark turnover may be a qualitative indicator of need; for example, it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality (para. 3.16). The Guidance also notes (para. 3.17) that overcrowding/congestion indicates that existing provision is unable to cope adequately with consumer demand, i.e. there is an imbalance between demand (available spending) and supply (existing floorspace capacity).

6.7 The GVA Grimley Cambridge Sub Region Retail Study identifies that the Tesco store at Bar Hill is performing at average levels (around 3% above company average), according to the survey results, but states *"in reality, the Bar Hill store may be performing better but this has not been identified by the survey as it focuses on main food shopping and may not have picked up less frequent but higher spend shopping trips"* (para. 10.29). This was confirmed by NLP's visit to the store when it was observed to be very busy and crowded.

6.8 Indeed, the strong performance of most convenience stores in the Cambridge sub-region produces capacity to support further convenience goods floorspace (GVA, para. 10.47).

6.9 The GVA Study took the Northstowe (2007) proposals into account in their assessment, confirming (para. 11.25) that 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 (DTZ, 2007). GVA consider that the impact of the convenience goods floorspace will largely fall upon the out of centre stores at Bar Hill and Milton.

6.10 The proposed supermarket at the Northstowe Phase 1 local centre will absorb some of the capacity from the existing facilities that are trading above company average, in particular the Tesco Extra at Bar Hill.

Location Specific Needs

6.11 The proposed local centre at Northstowe Phase 1 is site specific, as it is proposed specifically to meet the needs of the new residential population of Northstowe.

6.12 If suitable convenience shopping facilities are not provided in the local centre, there is likely to be a high level of travel by car, particularly to the out of centre Tesco Extra at Bar Hill, and there will be a clear deficiency in convenience shopping provision within Northstowe Phase 1.

6.13 There is also a location specific need to attract a retail use and retailer to anchor the proposed local centre. A small supermarket is the principal – and probably the only deliverable – way in which to appropriately anchor the local centre.

Quality of Existing Provision

6.14 The shops within the Northstowe catchment area are predominantly small scale, older units, although the Co-op is currently investing in improvements to its store in Cottenham. There is therefore a lack of modern retail units that are likely to meet operator demand and consumer expectation.

6.15 The proposed local centre at Northstowe Phase 1 will provide a supermarket type and size which is not currently available within the catchment area, more modern and larger than the Co-op at Cottenham (238 sq.m net), closer in role and scale to Budgens at Sawston (690 sq.m net), Co-op at Lakenheath (232 sq.m net), Sainsbury at Mildenhall (943 sq.m net) and Tesco at Brandon (1005 sq.m net).

Summary

6.16 The assessment demonstrates that there is a qualitative need for a small supermarket within the local centre at Northstowe Phase 1 to meet the needs of the existing (Longstanton and other) villages and proposed (Northstowe) residents, in particular helping to remedy the deficiency in existing retail provision and secure an anchor trader for the local centre.

7.0 Supermarket Scale

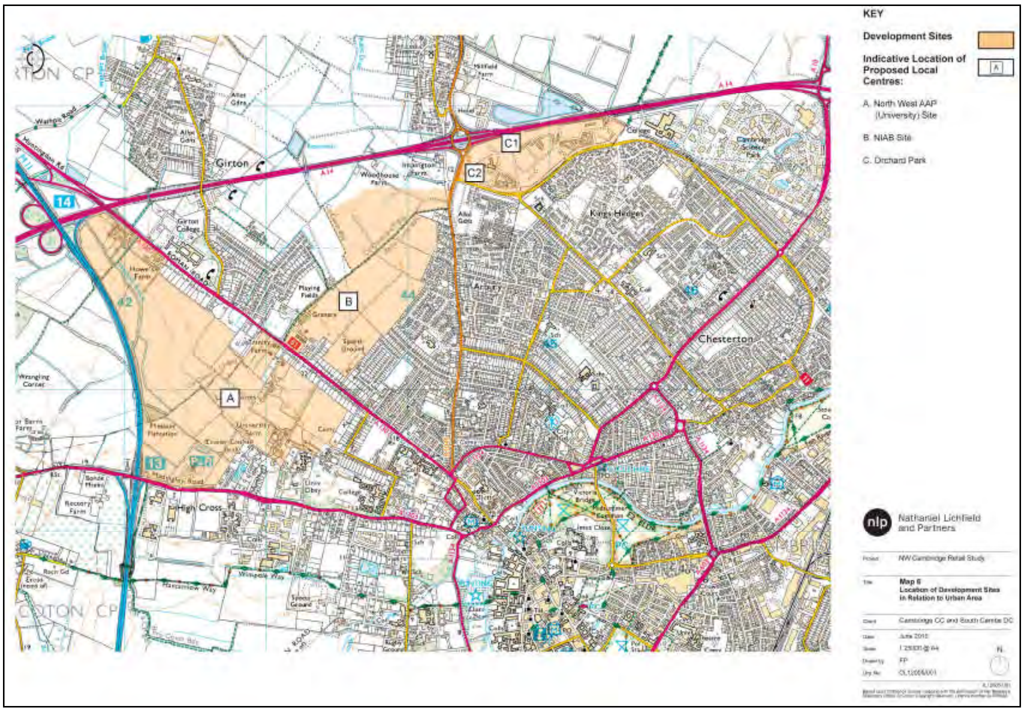
7.1 A supermarket of the size indicated in our retail capacity assessment (i.e. between 650 and 1,300 sq.m net floorspace by 2021) and for which we identify a qualitative need (particularly given Phase 1 preceding Northstowe town centre development by many years) is appropriate within a local centre, primarily serving local residents' day to day shopping needs.

7.2 In this section, in order to further inform the scale of retail provision for Northstowe Phase 1, we undertake a desktop review of:

- comparable operational or forthcoming local centres in new settlements/ urban extensions,
- retailer demand; and
- the influence of Northstowe town centre.

Urban Expansion / New Settlement Schemes

North West Cambridge Urban Expansion



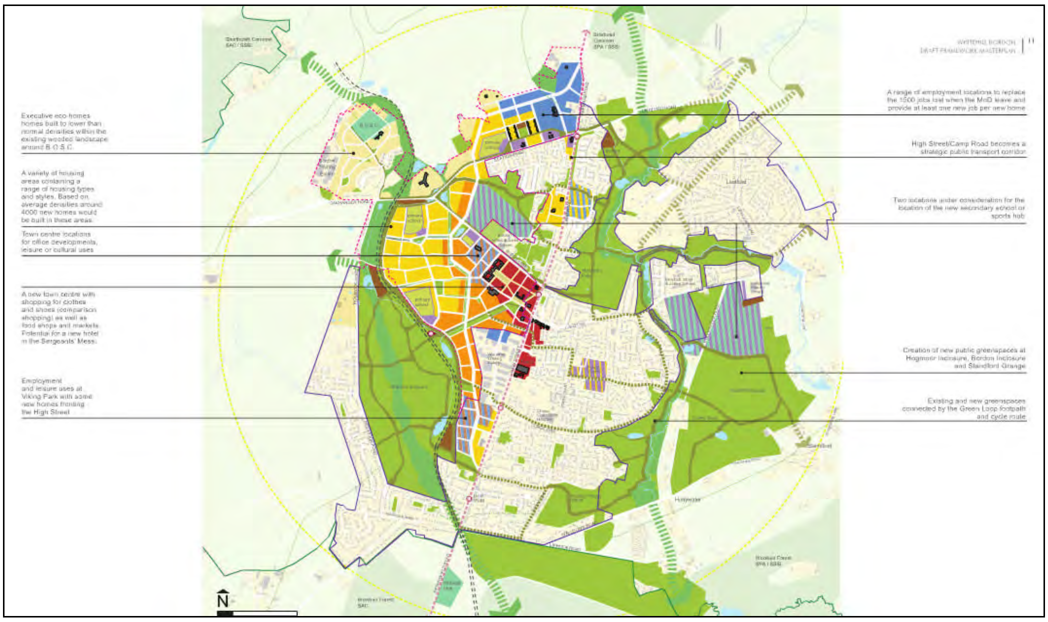
7.3 The North West Cambridge Supplementary Retail Study (NLP, 2010) provided a detailed retail planning evidence base for future expansion in north-west Cambridge. The study identified retail capacity for two to three new local centres up to 2021. The sites in question, known as the University site, NIAB and Orchard Park, are all subject to recent development proposals and planning applications.

7.4 A planning application for the University site submitted in September 2011 proposed new homes, student accommodation, education uses, conference centre and up to 5,300 sq.m. gross retail floorspace (Use Classes A1 to A5) (including a 2,000 sq.m. supermarket). The NIAB site has also been subject to applications for housing development and the inclusion of a local centre. The Orchard Park scheme secured outline permission for 900 new home in 2005, further applications have secured other parcels of land for housing development and also a local centre incorporating 807 sq.m net convenience floorspace.

Buckshaw Village New Town, Chorley

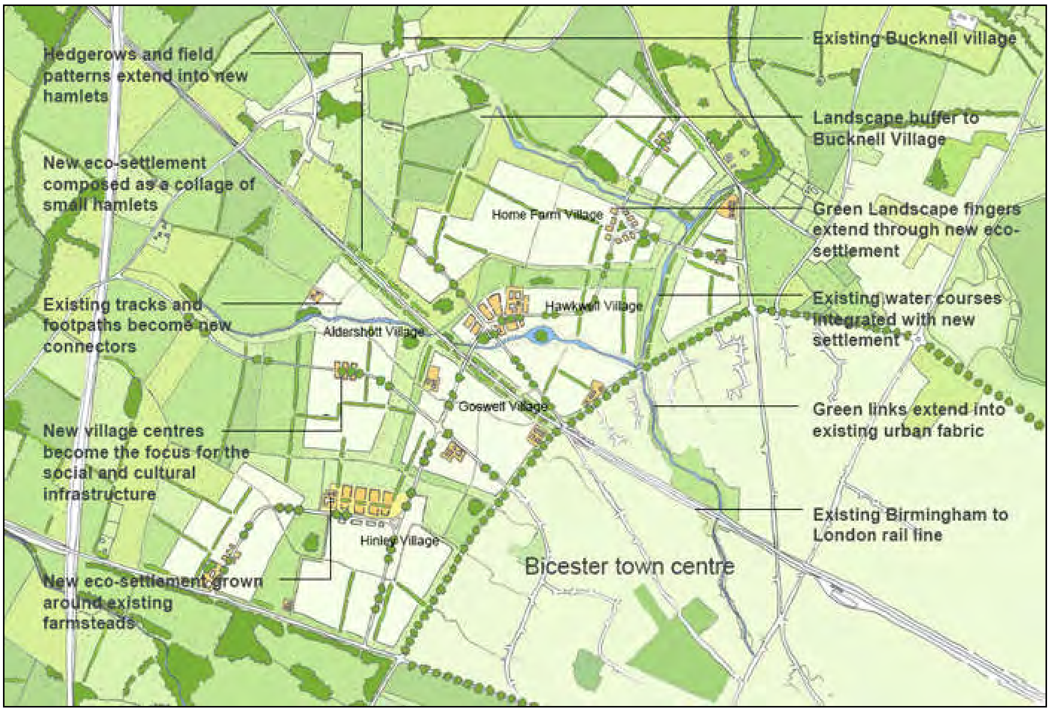
7.5 This new settlement has been under construction since the mid-2000s, with permissions totalling 4,120 new homes as well as large scale industrial floorspace. A proposed local centre to serve the estimated future population (approximately 10,000) includes retail capacity for 3,250 sq.m gross floorspace, assuming 75% retention rates for food shopping within the village and 20% from a secondary catchment (Retail Statement, Steven Abbot Associates. 2008).

Whitehill Bordon Eco Town, Hampshire



7.6 Another designation from the first round of eco towns, the recently updated Whitehill Bordon masterplan includes 4,000 new homes by 2026 (estimated population of 9,413), and includes retail capacity for 1,269 sq.m net convenience floorspace within a new town centre. The retail capacity assessment estimates a 48% retention rate for food shopping (Retail Assessment, NLP, 2011).

North West Bicester Urban Expansion, Oxfordshire

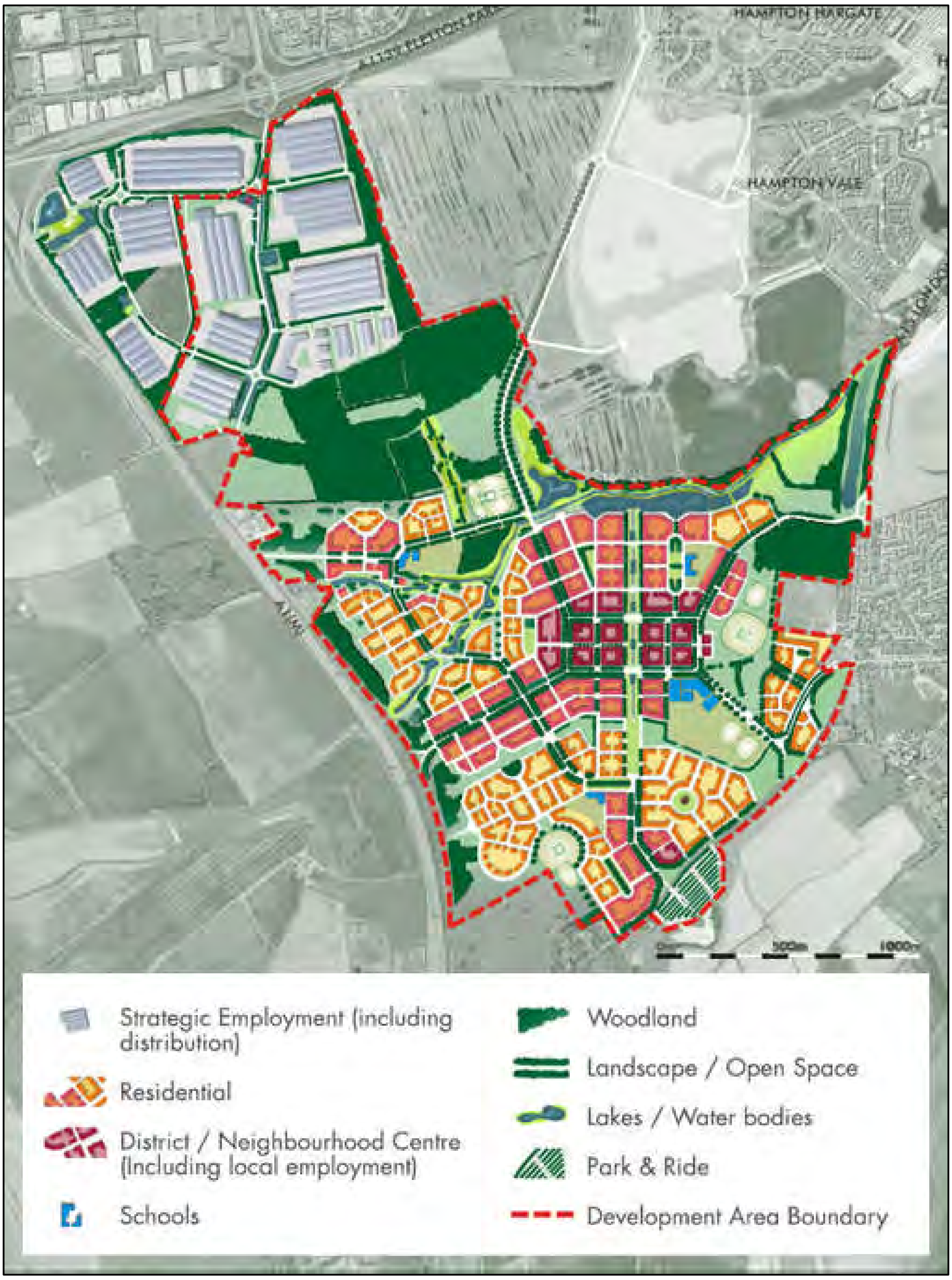


7.7 One of the first designated eco towns, NW Bicester will be an exemplar sustainable town incorporating 5,000 new homes. Phase 1 of the development has outline permission for 400 new homes, as well as three retail units totalling 770 sq.m, including a convenience store (Cherwell District Council ref 10/01780/HYBRID)

Poundbury Urban Expansion, Dorset

7.8 The Duchy of Cornwall's urban extension to the market town of Dorchester is a partially built scheme of 2,200 homes. The masterplan structure designates one district centre and five supporting neighbourhood centres. Phase 1 of the development has been built out and includes a Budgens 557 sq.m net convenience store. This represents one of the neighbourhood centres supporting a small allocation of 250 residential units.

Great Haddon Urban Extension, Peterborough



7.9 An urban extension scheme of 5,300 dwellings is proposed, comprising a settlement structure of one district centre and two neighbourhood centres. The retail capacity assessment and planning application is targeted at a 4,200 sq.m gross food store in the district centre, supported by two neighbourhood centres of 1,150 sq.m gross retail floorspace. This figure has been split into convenience (550 sq.m), comparison (100 sq.m) and other A1-A5 uses (500 sq.m) (Great Haddon Urban Expansion Area, Retail Impact Assessment, King Sturge 2011).

Retailer Demand

7.10 Potential retail floorspace capacity should also consider retailer demand, in this case from likely convenience store operators. Analysis of current retailer trends, as well as future aspirations, can assist in determining the likely floorspace requirements. The table below is a snapshot of the current retailer trends.

Table 7.1: Retailer Floorspace Demand

Type of Retailer	Retailer	Average Store Size (sq.m net)	Range (sq.m net)	Supermarket Range (500 – 1,000 sq.m net)
Major	Tesco	1,226	279 – 9,290	√
Major	Sainsbury's	1,904	232 – 9,290	√
Major	Asda	3,270	464 – 9,290 (includes Netto stores)	X
Major	Waitrose	1,672	279 – 5,574	√
Major	Morrisons	2,592	279 – 6,039	X
Major/Mid-range	M&S	1,672	186 – 9,290	√
Mid-range	Co-op	353	28 – 1,717	√
Mid-range	Budgens	437	43 – 1,393	√
Mid-range	Iceland	483	88 – 836	√
Discount	Aldi	836	186 – 1,394	√
Discount	Lidl	1,431	139 – 2,787	√

Source: Verdict 2011, IGD 2009 & Retailer Corporate Information

7.11 The sources used above have been used to establish current retailer trends to see whether there are formats suitable for the Northstowe Phase 1 local centre. It is clear from the figures above that the major retailers have traditionally been focused on large store formats. A change in recent years has seen the broadening of formats from these retailers to include smaller scale convenience stores, such as:

- Tesco Express (up to 280 sq.m net) and Metro (929 sq.m net plus) in high density urban areas and/or close to public transport interchanges;

- Little Waitrose (279 - 650 sq.m);
- Morrisons pilot M-Local stores (279 sq.m);
- Sainsbury's Local; and
- M&S Simply Food;

7.12 Sainsbury's have a small number of supermarkets (i.e. larger than convenience store formats) that would fit the range, but are often positioned on the high street rather than in local / neighbourhood centres. Tesco is similar in the fact that they have few supermarkets within the range. Supermarket operators are becoming increasingly more flexible in terms of store size.

- A Tesco Metro format generally requires a minimum store size of 929 sq.m net, which would exceed capacity (see Table 5.15A), while a Tesco Express store would undershoot it as the maximum size of Express stores is 280 sq.m net.
- The smaller format convenience stores from Sainsbury's and Morrisons are likely to be too small, whilst Asda is focused on its Netto fit out plan.
- Alongside Tesco, Waitrose and M&S Simply Food are the other quality operators with a format that may suit Northstowe Phase 1. The M&S corporate plan reveals they are keen to increase their presence in out of town locations with smaller store formats, and Little Waitrose is a new format seeking opportunities in affluent areas.

7.13 The smaller band of mid range retailers include Co-op, Budgens and Iceland. The Co-op are a well known neighbourhood retailer and currently have a foothold in the area with stores in Cottenham and Willingham. They are committed to neighbourhood retailing and plan to continue opening such stores. Iceland tends to focus on less affluent high street areas and is reportedly subject to a buy out since the collapse of its parent company Baugur.

7.14 The local independently led retailer, Budgens, often occupies stores in local/ neighbourhood centres, an example being Arbury Court in Cambridge (789 sq.m net) and Sawston (690 sq.m net). Poundbury Phase 1 is also home to a Budgens convenience store, an indication that these stores can be well suited to urban extensions / new settlements.

7.15 Aldi and Lidl make up our focus in the discount retailer division. Both of these retailers would suit the capacity range in terms of convenience floorspace, but may not be ideally suited to Northstowe's location or demographic. Aldi is typically associated with retail parks and district centres and generally requires 0.8ha sites to incorporate car parking requirements. Lidl stores tend to be slightly larger formats but the retailer has trialled smaller 'Express' stores in 2008, giving the impression they are prepared to adapt. Lidl are more flexible on store formats generally, but would typically require a 929 – 1,394 sq.m store.

Recent Appeals

7.16 We have also reviewed recent appeal decisions, which give an indication of recent retail operator aspirations.

7.17 In August 2010, an appeal by Tesco Stores Ltd in Ashtead, Surrey (ref. APP/C3620/A/10/2122996) for a 750 sq.m net new store was allowed. This appeal was considered in conjunction with an alternative proposal for a 1,115 sq.m, net store which was refused (ref. APP/C3620/A/09/2112341).

7.18 Ashtead is a large village with a population of approximately 13,500, the main convenience retail offer being an existing Tesco Express store (192 sq.m net). The Inspector considered that one of the key issues in assessing the appeal was whether the store would be too large in the context of Ashtead village centre or likely to harm the choice, vitality and viability of local shopping (para. 8). The Inspector stated that a supermarket of the size proposed (the smaller scheme) would consolidate the role and function of the district centre (para. 17). The Inspector noted that there is considerable leakage of trade from Ashtead (para. 16) and that a large majority of people around Ashtead go by car to out-of-centre stores or town centres at Leatherhead or Epsom, and states *"this pattern of retailing is unsustainable"* (para. 21). The Inspector concluded that the proposed store's function as an 'anchor' store in Ashtead would still be subservient to superstores within driving distance and would be convenient for top-up shopping, noting that a small Tesco Express store would do little to address the outflow of trade from Ashtead (para. 22).

7.19 A second appeal by Tesco Stores Ltd in Faringdon, Oxfordshire was approved in July 2011 (ref. APP/V3120/A/10/2143419). Faringdon is a small town centre with a population of 6,187. The main existing convenience retail provision comprises a Budgens store (715 sq.m net). The Tesco proposal included a store with 2,140 sq.m gross, and a net sales area of 1,405 sq.m (1,260 sq.m convenience and 145 sq.m comparison). A large amount of convenience expenditure in the Faringdon area is being spent outside the local catchment, particularly at out-of-centre superstores, due to the town having a very limited convenience offer (para. 12), with less than 25% of expenditure retained by Budgens (para. 14). The Inspector noted that the justification for a new foodstore is based on the sustainable objective of encouraging more Faringdon residents to do their convenience shopping locally, and confirmed that it is unsustainable for a large proportion of the local population to have to travel a long way to undertake their main food shopping (para. 24). The Inspector's report did not specifically consider the acceptability of the scale of the store in the context of the centre, however concluded the scheme would not have significant adverse impacts on the centre (para. 30), implying that the scale is appropriate.

7.20 There are some parallels between the Ashtead and Faringdon appeals and Northstowe, in terms of the limited existing retail provision, the influence of large out of centre stores on shopping patterns, and the role that the proposed supermarket seeks to fulfil. These appeals also demonstrate that Tesco is prepared to operate small supermarkets which perform a different role to the small Tesco Express stores; the same is true of Sainsbury and Waitrose too.

Summary

7.21 The analysis of scale of supermarket and other shopping provision in other new settlements and urban expansion areas, coupled with current trends in retailer demand and recent Tesco appeals, together provide an indication whether the scale of store identified in the needs assessment might be deliverable.

7.22 A number of options seem feasible for an anchor foodstore operator in the Phase 1 local centre as follows:

- Tesco, Sainsbury, M&S and Waitrose would be the most likely foodstore operators of the major retailers. Tesco and Sainsbury have few small format supermarkets, although the recent market activity suggests greater flexibility and a move towards small supermarkets. M&S and Waitrose are traditionally seen as affluent high street retailers.
- Two compatible foodstore retailers from the mid-range are Budgens and Co-op. Budgens has proved to be successful in similar locations and sized settlements (including Cambridgeshire), but would need to be one of their larger format stores. The Co-op is a chain committed to small format neighbourhood retailing and has market town formats that are comparable to the proposed Northstowe floorspace range, but recent examples are seldom found post 2000.
- The discounters all fit the indicative capacity floorspace range for a supermarket. However, Iceland's customary position is in less affluent high streets, whilst Aldi and Lidl tend to require much larger plots for their stores and respective car parking requirements. These larger formats are less suited to a mixed-use local centre such as Northstowe Phase 1.

8.0 Conclusions

8.1 Northstowe is a planned new town, near Longstanton/Oakington villages to the northwest of Cambridge, within South Cambridgeshire district.

8.2 The framework masterplan for Northstowe proposes an alternative structure and phasing of the new settlement, including two neighbourhoods each serviced by a larger local centre, in addition to a town centre. The Phase 1 planning application proposes 1,500 homes, located immediately adjacent to the B1050 Station Road, to act as a focal point for the new neighbourhood.

8.3 The review of PPS4 Practice Guidance and town and local centre provision in Cambridgeshire market towns does provide a broad indication of the nature of local centre and scale of supermarket development within such centres, but only in so far as this reflects the traditional growth, expansion and evolution of towns and their retail provision.

8.4 The Northstowe AAP (policy D2) requirement to provide for an accessible Local Centre for day to day shopping built as part of the Phase 1 residential neighbourhood, necessitates that the local centre should meet more shopping needs and retain more trips and spending, if the settlement is to be more sustainable and self sufficient (than existing large villages in Cambridgeshire). This requirement creates a tension with the AAP D2.1 objective that the local centres (then envisaged to number five rather than two) should contain *"modest shopping facilitie*s…*typical of many* [there are few] *local centres in Cambridgeshire market towns"*.

8.5 It is anticipated that the new local centre proposed as part of Phase 1 of the Northstowe development will fit into the retail hierarchy beneath the new town centre at Northstowe, performing a role akin to a "rural centre" (e.g. Sawston) serving its local catchment, complementing and subsidiary to Cambridgeshire's market town centres.

8.6 The role of the proposed Phase 1 local centre in the existing retail hierarchy, the existing retail provision and analyses of existing shopping patterns, have been assessed to determine its catchment area. The primary catchment area is identified to comprise Northstowe Phase 1 neighbourhood and the adjacent Longstanton village and the secondary catchment area to include the villages of Cottenham, Oakington, Rampton, Willingham, Over and Swavesey.

8.7 Existing retail provision within the catchment area is limited to small scale, local shopping facilities, primarily serving a walk-in catchment. Existing main food shopping patterns within the catchment area are dominated by the influence of the Tesco store at Bar Hill to the south west.

8.8 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 approximately 650 and 1,300 sq.m net floorspace by 2021. The floorspace range is dependant upon whether the store is operated by a major retailer (e.g. Tesco or Sainsburys) 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.

8.9 In addition, the local centre could support approximately 500 sq.m net of comparison goods floorspace by 2016, and approximately 850 sq.m net by 2021, some of which would comprise comparison goods floorspace within the supermarket.

8.10 Our qualitative assessment finds that there is a need for a modest sized supermarket, broadly up to 1,000 sq.m net, within the local centre, to better meet the daily needs of the existing and future residents. In particular, such a store would secure an anchor trader for the Northstowe Phase 1 local centre, to ensure its delivery as a focal point and critical part of the community's development, whilst also remedying the deficiency in existing retail provision in the catchment area villages and creating more sustainable shopping patterns.

8.11 Our analysis of retailer formats and current trends indicates that whilst the mid-range market and discount food retailers have long provided stores in the 500 sq m to 1,300 sq m size range, the provision of supermarkets (separate from convenience store formats) from the major grocers, particularly Tesco and Sainsbury's, have only sought to develop such smaller store formats more recently in seeking representation in smaller settlements.

8.12 We anticipate that such a store format, if operated by a major retailer, would be new to South Cambridgeshire and would broaden the local retail offer in Northstowe's catchment. It would have a limited main food shopping role, thereby filling the gap between the very small village convenience shops in the Northstowe Phase 1 catchment and the distant superstores. We would, therefore, expect it to serve its local centre function whilst complementing existing retail provision with a different role and function.

8.13 Accordingly, we conclude that the retail planning analysis within this Local Centre Strategy and Retail Needs Assessment indicates that a 750-1,000 sq.m net supermarket would be an appropriate sized supermarket to anchor the Northstowe Phase 1 Local Centre.