Appendix 10 Extract from Northstowe Retail Capacity and Impact Report, DTZ, December 2007

19 Northstowe

retail capacity and impact report

december 2007

prepared by

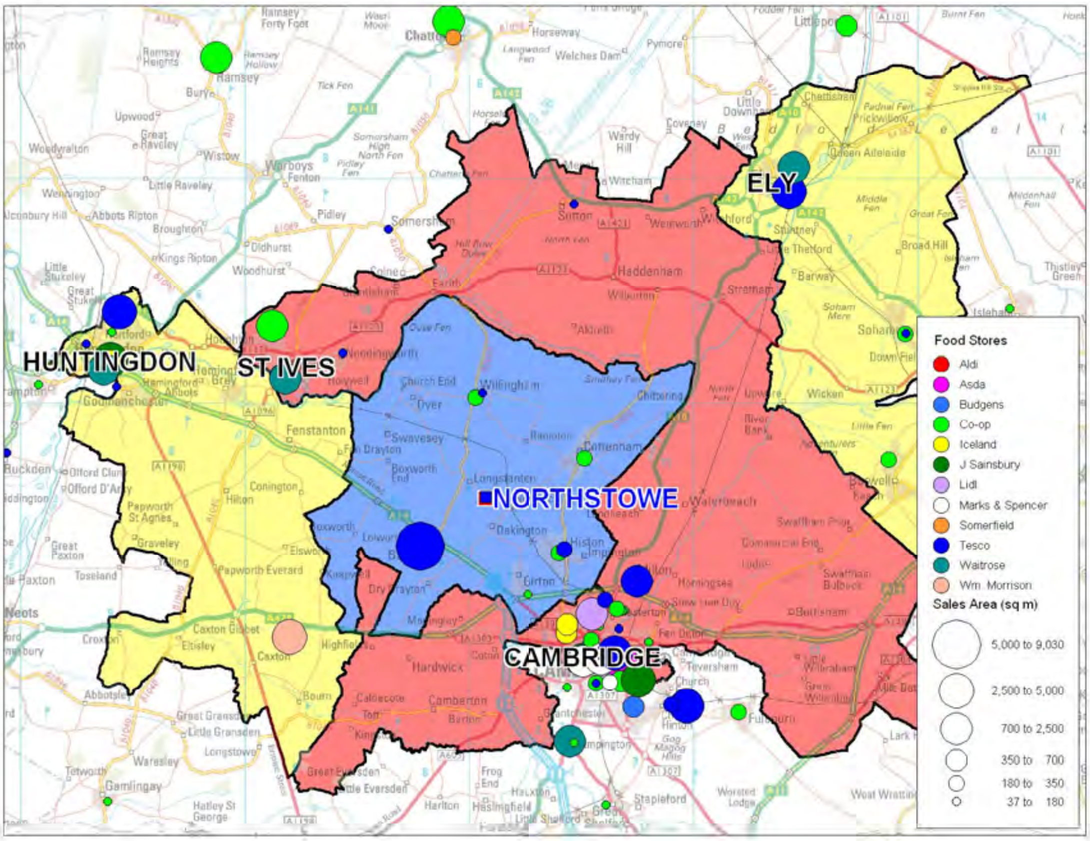
DTZ

on behalf of

English Partnerships
The National Regeneration Agency

GALLAGHER
LONGSTANTON LTD

Figure 4.4: Food Based Retail Provision



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4.22 At least one of the main foodstore operators, namely Tesco, Sainsbury, Asda, Waitrose, Morrisons and Marks & Spencer Simply Food, have representation within each of the larger centres in the study area. **Table 4.4** provides a summary of the convenience retail floorspace in the study area.

4.23 The main concentration of foodstores are located in the area surrounding **Cambridge**, where there is a wide range of operators and the highest concentration of population. **Huntingdon**, and to a lesser extent, **Ely** and **St Ives**, also enjoy a choice of operators in close proximity to the centres. Tesco at **Bar Hill** and Morrisons at **Cambourne** represent the only large foodstores in much smaller centres, in effect taking the role of out-of-centre stores (due to the size of the store in comparison to the centre in which it is located, and its proximity to the strategic road network), which are not in close proximity to a larger centre.

Table 4.4: Main Food Based Retail Stores

Name	Location	Floorspace sq m gross *
Cambridge		
Sainsbury's Central	42 – 45 Sidney Street	2,040
M&S Simply Food	41 – 44 The Grafton	1,356
Huntingdon		
Waitrose	15 St Benedicts Court	1,839
M&S Simply Food	High Street	572
Iceland	113 High Street	732
Sainsbury's	St Germain Walk	4,959
Ely		
Iceland	9 The Cloisters	732
Waitrose	The Cloisters	2,145
Spar	29 High Street	279
St Ives		
Waitrose	Library Row Station Road	2,144
Cambourne		
Morrisons	Broad Street	5,924
Cottenham		
Co-op	High Street	362
Histon		
Tesco Express	High Street	431
Co-op	High Street	262
Milton		
One Stop	High Street	154
Willingham		
One Stop	Church Street	205
Co-op	George Street	368
Out of centre		
Asda Wal-Mart	Coldham's Lane, Cambridge	6,930
Sainsbury's	Coldham's Lane, Cambridge	6,653
Tesco	Yarrow Road, Cambridge	5,574
Tesco	Cheddars Lane, Cambridge	6,916
Tesco	15 – 18 Viking Way, Bar Hill	15,214
Tesco	Angel Drove, Ely	6,935
Rainbow	Constable Road, St Ives	2,601
Tesco	Cambridge Road, Milton	6,037
Tesco	Abbots Road, Huntingdon	6,080
TOTAL		**91,520**

* gross floorspace includes comparison floorspace where provided as part of a larger store plus any associated storage

DTZ's Suggested Retail Hierarchy

4.24 From the overview of the retail provision in the centres in the study area, DTZ have defined the retail hierarchy for the study area. DTZ's view on the appropriate retail hierarchy of the centres is based on the retail provision and the role and function of each centre. To avoid any confusion, DTZ have used the terms 'regional centres', 'town centres', 'district centres' 'village centres' and 'small village centres'. These are not specifically the terms used by the district councils (see **Table 4.1**) as each authority uses different terminology.

4.25 DTZ's suggested Retail Hierarchy is shown in **Table 4.5** below:

Table 4.5: DTZ's Suggested Retail Hierarchy

Retail Hierarchy	Centre
Regional Centres	Cambridge
Town Centres	Ely, Huntingdon and St Ives
District Centres	Bar Hill, Cambourne, Histon and Milton
Village Centres	Cottenham, Fenstanton, Papworth Everard, Waterbeach, and Willingham
Small Village Centres	Earth, Girton, Oakington, Over, Longstanton, Somersham and Swavesey

4.26 The regional centre of **Cambridge** is clearly the dominant retailing centre with its greater range of comparison goods stores, which include department stores, variety stores, key fashion retailers and an extensive range of national multiple retailers. As such, the city centre, including both the historic centre and the Grafton Centre area, draws a significant number of shoppers from the study area.

4.27 It also should be noted that there are several retail development schemes in the pipeline for Cambridge city centre. The most significant scheme will be the major redevelopment of the Grand Arcade in the heart of the city centre, which will comprise a total of c.38,000 sq m net of retail floorspace. More detail about this and other development schemes is contained in the Retail Impact Assessment in **Section 9**.

4.28 Moving down the hierarchy are the town centres of **Ely**, **Huntingdon** and **St Ives**, which offer a range of convenience and comparison goods shopping, as well as the services and facilities normally associated with centres of this size and influence. At this level in the retail hierarchy, a selection of quality national multiple retailers are present, but there is no significant department store or variety store representation. These centres collectively address district needs and requirements.

4.29 Further down the shopping hierarchy are the centres of **Bar Hill**, **Cambourne**, **Histon** and **Milton**, wherein the comparison shopping and service facilities; together with community activities i.e. community centres, libraries, health services and other public amenities, principally serve local needs. National multiple retailer representation is somewhat limited. In terms of convenience shopping, the provision in each of the centres is dominated by a large foodstore occupied by a major convenience retailer (Tesco at Bar Hill, Milton and Histon; and Morrisons at Cambourne). Subsequently, the catchment areas for main food and top-up food shopping serves a wide area, which is further enlarged by close proximity to main regional road arteries.

4.30 **Milton** is included in this category, principally due to the amount of retail provision available. However, the retail provision in Milton is predominantly a Tesco store in an out-of-centre location, related to the A14 and the northern built-up area of Cambridge and is not part of the small village.

4.31 The centres of **Cottenham**, **Fenstanton**, **Papworth Everard**, **Waterbeach** and **Willingham** provide a shopping function predominately serving local needs. Although there is definitely an increased emphasis on convenience shops and services in these centres, the majority of their food and non-food expenditure is leaked to higher order centres, but this is to be expected. Their current performance and future prospects increasingly relies upon the independent retail sector.

4.32 **Fenstanton**, has less retail floorspace that some of the centres within the 'small village centres'. However, it is DTZ's judgement that the range of retail provision within Fenstanton warrants its inclusion as a 'village centre'. Conversely, whilst **Girton** has sufficient retail floorspace to warrant inclusion as a 'village centre' in the retail hierarchy, it is DTZ's judgement that this more appropriately falls within the 'small village centres' category.

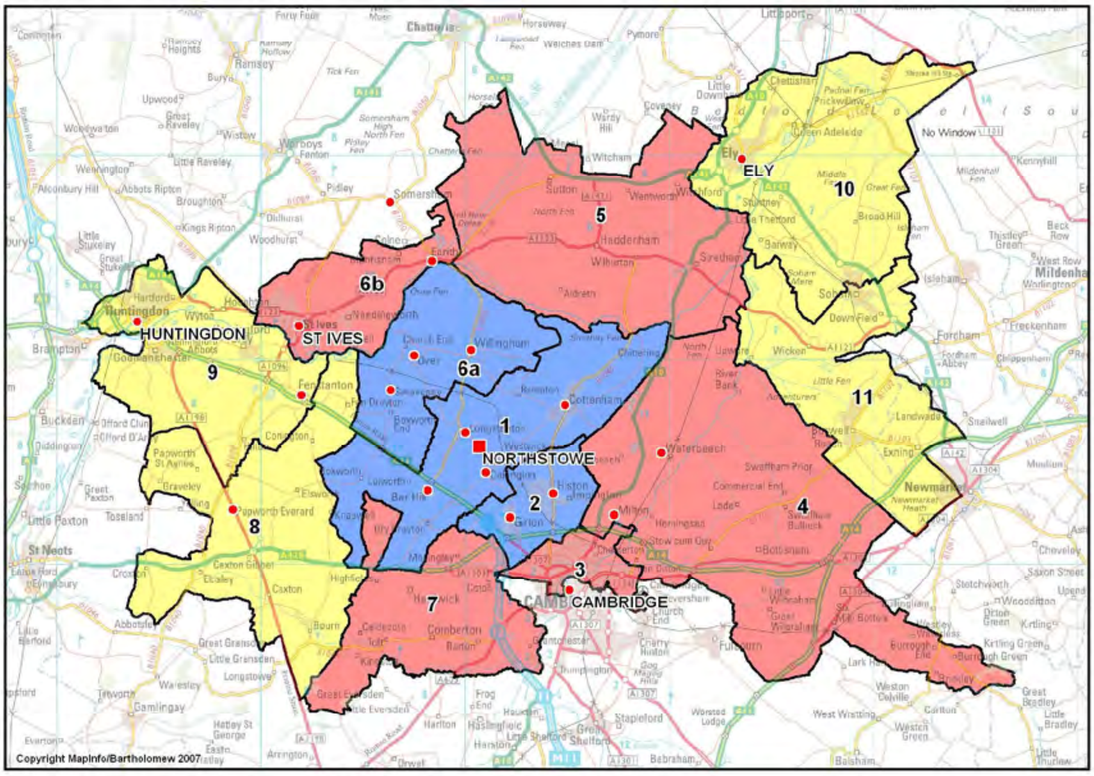
4.33 The smallest centres in the shopping hierarchy include **Earith**, **Girton**, **Oakington**, **Over**, **Longstanton**, **Somersham** and **Swavesey**. These centres generally contain only a few small shops, normally convenience stores and post offices, serving a walk-in catchment population. They are entirely reliant on local expenditure. In these centres, national multiple representation is negligible.

4.34 At the various levels in the shopping hierarchy, each centre has a different role and function, performance level and potential prospects. Indeed, the established hierarchy does not prevent the smaller centres from continuing to be viable. Their current role is to provide for the day-to-day needs of the local population and, moreover, a range of shopping for less mobile shoppers. However, each centre's performance and prospects cannot be divorced from those of competing centres, both higher up and lower down the retail hierarchy.

4.35 Although the centres described do not include every centre within the study area, the decision to include or exclude centres was based on the perceived likely impact of development at Northstowe.

8.5 For the purposes of this Report, the eleven areas have been amalgamated into four zones. Survey zones 1, 2 and 6a form the Core Zone, survey zones 3, 4, 5, 6b and 7 form the Secondary Zone, survey zones 8 and 9 form the Outer East Zone and survey zones 10 and 11 form the Outer West Zone. **Figure 8.2** illustrates the amalgamated zones. For clarification, these are the survey zones and are not considered to define the retail catchment area for Northstowe.

Figure 8.2: Amalgamated Survey Zones



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8.6 The 1,650 household telephone interviews were split equally across each of the zones. For the subsequent analysis of the data, the number of interviews was then weighted according to the population level in the individual zones. **Table 8.1** below shows the original number of interviews undertaken in each of the amalgamated zones and also the weighted number of interviews.

Table 8.1: Interview Numbers

Zone	No of Interviews	Weighted Interviews
Core Zone	375	247
Secondary Zone	675	809
Outer East Zone	300	297
Outer West Zone	300	297

Household Survey Results

Market Shares

8.8 In order for the data collated from the household survey to be used within the impact modelling, the market shares for the individual categories must be amalgamated and reconciled with the underlying expenditure figures relating to the population.

8.9 For the convenience shares, the 'main food' and 'top-up' figures are combined, whilst for comparison shares, 'furniture and carpets', 'DIY', 'large and small electrical' and 'clothing and footwear' are aggregated. The amalgamation is undertaken in a number of steps.

8.10 The survey data is stripped of any incorrect answers and also of any answers where respondents said "don't know" or "don't buy", the answers are then collated to correspond to the chosen study centres. The Figures are then converted into percentages.

Market Shares – Convenience Goods

8.11 **Table 8.3** below summarises the unadjusted market shares for convenience goods, as provided by the results of the household survey.

Table 8.3: Convenience Market Shares (unadjusted)

Centre	Core Zone	Secondary Zone	Outer East Zone	Outer West Zone
Town Centres:				
Cambridge	3.0%	4.0%	1.0%	1.0%
Ely	1.0%	6.0%	33.0%	0%
Huntingdon	0%	2.0%	0%	20.0%
St Ives	0%	5.0%	0%	9.0%
Rural Centres:				
Principal Village Centres (1)	18.0%	1.0%	0%	1.0%
Cambourne	3.0%	4.0%	1.0%	30.0%
Out of Centre:				
Bar Hill	50.0%	16.0%	0%	14.0%
Cambridge	4.0%	15.0%	8.0%	1.0%
Ely	1.0%	12.0%	35.0%	0%
Huntingdon	1.0%	3.0%	0%	18.0%
Milton	12.0%	14.0%	1.0%	0%
St Ives	1.0%	2.0%	0%	0%
Other:				
Local Shops plus stores elsewhere	6.0%	14.0%	19.0%	8.0%
Special Forms of Trading (inc online)	0%	1.0%	0%	0%

(1) Principal Village Centres include Cottenham, Willingham and Histon

Core Zone

8.12 In respect of convenience shopping in the Core Zone, **Table 8.3** shows that **Bar Hill** is the most popular destination for convenience shopping, accounting for some 50% of the market share. When the two types of convenience shopping are separated (main food shopping and top-up shopping), the data shows that **Bar Hill** accounts for 58% of the market share for main food shopping and 8.5% of the top-up share. This is not surprising given the size and accessibility of the Tesco store at Bar Hill.

8.13 **Bar Hill** also accounts for 16% of the market share in the Secondary Zone, and 14% in the Outer West Zone. Given the distance from the Outer East Zone, it is not unsurprising that Bar Hill's convenience market share for this zone is 0%. The smaller market shares partially reflect the distance between Bar Hill and many of the areas in the Secondary and Outer East Zones, but also the fact that these zones are larger and also have their own convenience stores, giving consumers a wider choice of where to shop.

8.14 In the Core Zone, the **principal village centres** of Cottenham, Willingham and Histon also take an important combined market share (18%). This is principally accounted for by the Co-op store in **Cottenham** and the Tesco Express in **Histon**. Interestingly, **Milton** (Out of Centre), notably the large Tesco, also takes a reasonable market share (12%), principally due to its accessibility by the strategic road network.

8.15 Overall, 28% of the market share in the Core Zone can be attributed to stores located outside the Core Zone. As previously noted, the Tesco store in **Milton** accounts for the majority of this (12%). **Cambridge, Cambourne, Ely, Huntingdon** and **St Ives** all account for small market shares of 1-4%. The leakage of these market shares can be partially explained by those who may work in these centres and shop close to their place of work, and also those who link convenience shopping trips with comparison shopping trips to these larger centres.

Secondary Zone

8.16 In the Secondary Zone, the unadjusted market shares show that **out of centre** convenience destinations remain dominant, although there is a greater spread of market share, with customers choosing stores in **Bar Hill** (16%), **Cambridge** (15%), and **Milton** (14%). Local shops and stores elsewhere also take a reasonable market share (14%), reflecting the extensive rural nature of the Secondary Zone.

Outer East Zone

8.17 In the Outer East Zone, the dominant market share for convenience goods is taken by **Ely out of centre** (35%) and **Ely town centre** (33%). This reflects the dominance of Ely in this study zone.

10.47 Figures illustrating the convenience and comparison goods impact on St Ives Town Centre are provided in **Appendix 3**. This illustrates the significant increase in potential turnover (dotted line) anticipated during this period. When taking account of Northstowe (solid line), the potential turnover reduces slightly, resulting in the negative impact. Whilst there will be some impact for both convenience and comparison goods, **the turnover in St Ives in 2024/25 is still significantly higher than in 2007.**

10.48 Notwithstanding the limited level of trade diversion from the town centre to Northstowe, the new centre is likely to exercise considerable influence over the immediate St Ives area. This influence may be expected to translate into shopping trips diverted from Huntingdon town centre, from Tesco and the adjoining retail park on the outskirts of Huntingdon, and more particularly from Bar Hill. The draw of Northstowe will be underpinned by both straightforward road access via the A14 and by the Guided Busway. For example, for people living in the extensive residential areas concentrated north of St Ives town centre, the CGB will make the new town centre almost as quick and easy to reach as either Huntingdon or Bar Hill is now.

Principal Village Centres

10.49 The review at **Section 7 (Retail Overview – Larger Centres)** showed that local shops food shops in **Cottenham**, **Histon** and **Willingham** are all geared to catering for the top-up needs of their respective local populations. As demonstrated by the surveys, they attract little trade from further afield. Similarly, comparison shops that also rely on locally generated expenditure depend largely on the presence of these convenience stores as the primary attractions.

10.50 Northstowe town centre will not alter this situation in any way, in that it will not be a convenient alternative for meeting immediate day-to-day requirements. Instead, it will divert bulk food shopping trips primarily from the existing large stores at Bar Hill (in respect of Willingham) and – albeit to a very limited extent - Milton (in respect of Cottenham and Histon). For most Willingham residents, Northstowe will be at least as readily accessible as Bar Hill, although the absence of road links from the north-east side of the town suggests that Tesco Milton will continue to be a preferred destination for people living in Cottenham and Histon.

10.51 Alongside local shops, all three villages (and others in the area such as Fenstanton) have a greater or lesser number of specialist comparison goods outlets which serve a wider market, as explained in **Section 7 (Retail Overview – Smaller Centres)**. This is especially the case in Cottenham with two furniture outlets, although neither these nor other retailers in this category elsewhere are necessarily located in the village centre, and they contribute only marginally if at all to the trading potential of local shops.

Appendix 11 NLP Retail Capacity Data Assumptions

Data Assumptions

Growth Rates

Experian's EBS national expenditure information has been used to forecast expenditure within the study area in the short term (2010 to 2013). Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

For longer term projections Experian provide forecast growth rates and trend line projections. Experian's average annual growth forecast for the period 2014 to 2018 is 0.5% for convenience goods and 3% for comparison goods. The ultra long term trend line annual growth rates are 0.6% for convenience goods and 5.9% for comparison goods.

We believe the Experian's lower EBS growth forecast rates for 2011 to 2013 reflect the current economic circumstances and provide an appropriate growth rate for the short term. In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth forecasts (0.5% and 3%) are relatively cautious based on past growth rates. The ultra long trend line projection for comparison goods (5.9%) is relatively optimistic. We believe long term growth (after 2013) is likely to fall within this range and therefore we adopt the mid-point growth rate between Experian's lower growth forecast and the higher trend line projections. The mid-point annual growth rates adopted after 2013 are 0.55% for convenience goods and 4.45% for comparison goods. In our view these mid-point growth rates provide the most appropriate average growth rate following the economic recovery. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading (SFT)

Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian information suggests that non-store retail sales in 2010 is:

- 7.4% of convenience goods expenditure; and
- 11.7% of comparison goods expenditure.

Experian predicts that these figures will increase in the future.

Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace.

The adjusted figures suggest that SFT sales in 2010 is:

- 3.7% of convenience goods expenditure; and
- 8.8% of comparison goods expenditure.

The projections provided by Experian suggest that these percentages could increase to 5.9% and 12.7% by 2016.

Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. This study makes an allowance for future growth in e-tailing based on Experian projections. On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a small percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2016/17. Experian's September 2011 figures suggest that the growth in e-tailing has to a certain extent been at the expense of other forms of home shopping such as catalogue and mail order shopping.

Growth in Turnover Efficiency

The potential for existing convenience floorspace to increase its turnover efficiency in real terms in the future has been considered. Retail studies should assess the potential for existing floorspace to increase its productivity in the future. Historically limited or no growth in turnover density has been assumed by most retail planners for convenience floorspace. Experian suggest there could be a reduction in convenience efficiency in the short term, then 0.4% per annum growth is recommended between 2014 to 2018 and 0.2% thereafter (Source: Experian Retail Planner Briefing September 2011). The reduction in turnover efficiency in the short term is expected to cancel out longer term growth, therefore no change in convenience goods turnover efficiency is assumed in this study.

Recent information provided by Experian (September 2011) recommends turnover efficiency growth of 1.7% per annum for the period after 2013, in line with the post economic recovery expenditure growth rates. We have assumed no growth in turnover efficiency in the short term up to 2013, reflecting Experian's lower expenditure growth forecasts (an average of 1.4% per annum).

Appendix 12 Extract from Breckland Retail and Town Centre Study, NLP, 2010; Plan Showing Location of Lakenheath; and Extract from Forest Heath Retail and Town Centre Study, GVA Grimley, 2006

Nathaniel Lichfield and Partners

Planning Design Economics

Breckland Retail and Town Centre Study

Breckland Council

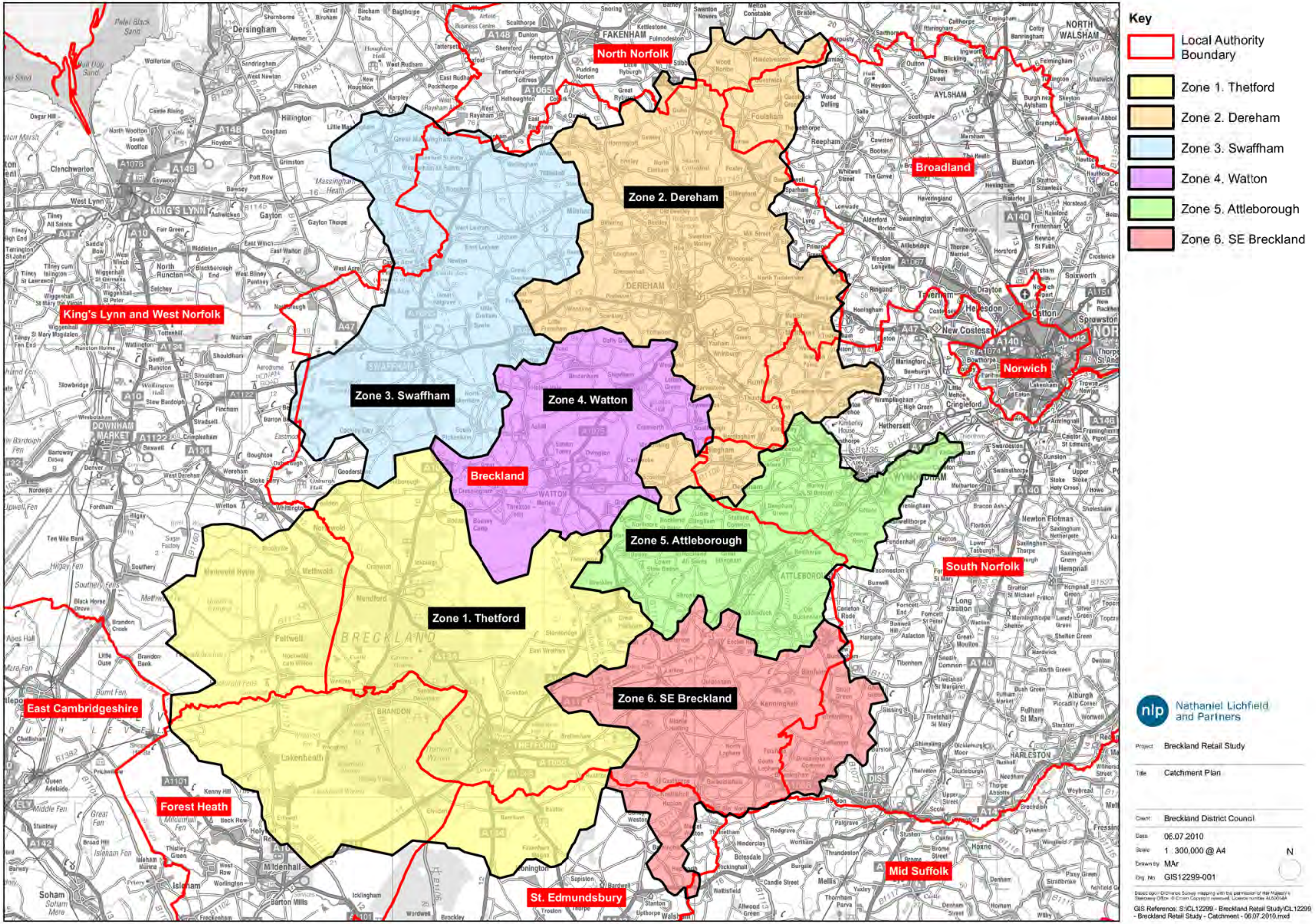
August 2010

Nathaniel Lichfield
and Partners
14 Regent's Wharf
All Saints Street
London N1 9RL

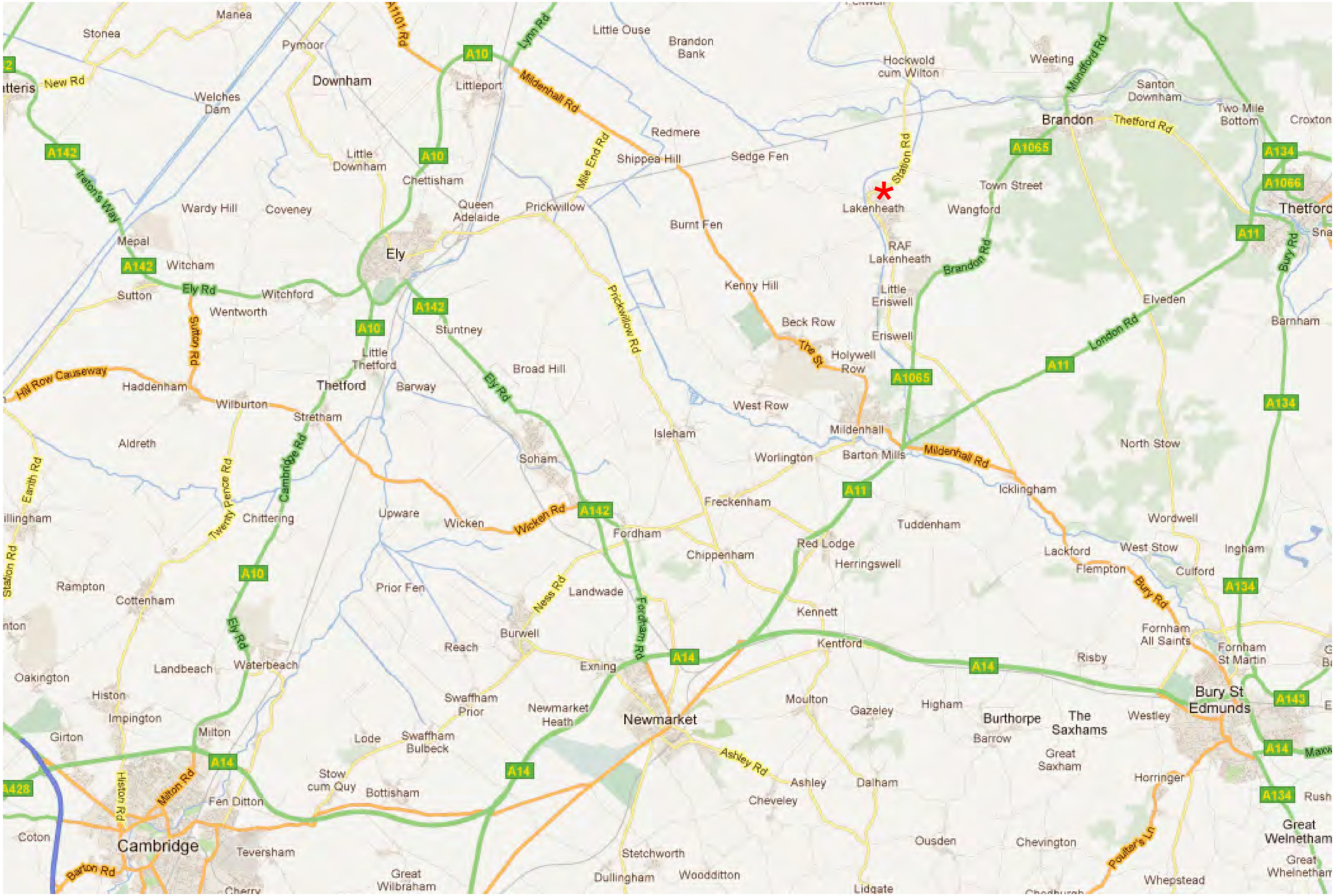
nlpplanning.com

Breckland Survey Zones

ZONE	POSTCODES
1. Thetford	IP24 1, IP24 2, IP24 3, IP26 4, IP26 5, IP27 0, IP27 9
2. Dereham	NR19 1, NR19 2, NR20 3, NR20 4, NR20 5, NR9 4
3. Swaffham	PE32 2, PE37 7, PE37 8
4. Watton	IP25 6, IP25 7
5. Attleborough	NR17 1, NE17 2, NR18 9
6. South East Breckland	NR16 2, IP22 2



Key
Local Authority Boundary
Zone 1. Thetford
Zone 2. Dereham
Zone 3. Swaffham
Zone 4. Watton
Zone 5. Attleborough
Zone 6. SE Breckland
North Norfolk
Broadland
Norwich
South Norfolk
Mid Suffolk
St. Edmundsbury
Forest Heath
East Cambridgeshire
King's Lynn and West Norfolk
Breckland
Nathaniel Lichfield and Partners
Project Breckland Retail Study
Title Catchment Plan
Client Breckland District Council
Date 06.07.2010
Scale 1 : 300,000 @ A4
Drawn by MAr
Drg. No GIS12299-001
N
GIS Reference: S:\CL12299 - Breckland Retail Study\CL12299 - Breckland Retail Study - Catchment - 06.07.2010.mxd


Manea
Stonea
Pymoor
Downham
Welches Dam
New Rd
A142
Ireton's Way
Mepal
Witcham
Wardy Hill
Coveney
Little Downham
A10
Littleport
A1101 Rd
Lynn Rd
Mildenhall Rd
Little Ouse
Brandon Bank
Redmere
Shippea Hill
Sedge Fen
Mile End Rd
Chettisham
Queen Adelaide
Prickwillow
Ely
Sutton
Ely Rd
Witchford
Wentworth
Sutton Rd
A142
Stuntney
Little Thetford
Thetford
Broad Hill
Barway
Haddenham
Hill Row Causeway
Wilburton
Stretham
Aldreth
Earith Rd
Cambridge Rd
Twenty Pence Rd
Chittering
Rampton
Cottenham
Station Rd
Oakington
Landbeach
Waterbeach
Histon
Impington
Girton
Milton
A14
Milton Rd
Histon Rd
Fen Ditton
Coton
Cambridge
Barton Rd
Teversham
Great Wilbraham
Bottisham
Stow cum Quy
Lode
Swaffham Bulbeck
Swaffham Prior
Reach
Prior Fen
Upware
Wicken
Wicken Rd
Soham
Burwell
Ness Rd
Landwade
Fordham
Fordham Rd
Exning
Newmarket Heath
Newmarket
Ashley Rd
Ashley
Cheveley
Stetchworth
Dullingham
Woodditton
Prickwillow Rd
Isleham
Burnt Fen
Kenny Hill
Beck Row
The St
Holywell Row
West Row
Mildenhall
Barton Mills
Mildenhall Rd
Worlington
Freckenham
Chippenham
Red Lodge
Herringswell
Tuddenham
Kennett
Kentford
Moulton
Gazeley
Higham
Dalham
Ousden
Lidgate
Hockwold cum Wilton
Station Rd
Lakenheath
RAF Lakenheath
Little Eriswell
Eriswell
A1065
Brandon Rd
Wangford
Town Street
Weeting
Mundford Rd
Brandon
Santon Downham
Thetford Rd
Two Mile Bottom
Croxton
A134
A1066
A11
Bury Rd
Barnham
Elveden
London Rd
North Stow
Icklingham
Wordwell
West Stow
Lackford
Flempton
Bury Rd
Culford
Ingham
Fornham All Saints
Fornham St Martin
Risby
Burthorpe
Barrow
The Saxhams
Great Saxham
Westley
Bury St Edmunds
A143
Horringer
Poulter's Ln
Chevington
Whepstead
Great Welnetham
Rush

GVA Grimley

FOREST HEATH DISTRICT COUNCIL

Retail and Town Centre Study

June 2006

www.gvagrimley.co.uk

6.23 Investment in Brandon has recently been undertaken in partnership with Forest Heath District Council, Suffolk County Council, Brandon Communities Partnership and English Heritage. They have joined together in a 3-year programme targeted at restoration called the Brandon Heritage Economic Regeneration scheme (HERS), with the general aim of attracting more people to the town. Approximately £300,000 of the work has been used to fund Historic Building Grants to commercial properties for repairs/restoration works. Other regeneration activities are also taking place with grants, advice and support being provided to local businesses.

6.24 To assess people's perceptions of Brandon we have drawn on the Household Telephone Survey. The small minority of shoppers that use Brandon for non food shopping like it primarily because it has an attractive environment (11.7%), is close to home (16%) and work (7.4%). In contrast, respondents dislikes, included just under 15% of people feeling the centre had a poor provision of foodstores, 21.3% raise the poor disabled access in the centre, whilst 13.8% disliked the amount of vacant units in the centre.

LAKENHEATH

6.25 Lakenheath, is defined as a large rural centre in the Adopted Local Plan, and is located approximately 20km to the north east of Newmarket, and approximately 7.6km to the north of Mildenhall. The centre is accessed via the B1112 which runs directly through the centre. It is an historical village, with the main retail offer spread sporadically throughout the High Street. Off street car parking within the centre is located off Wings Road in the heart of the centre, although the majority of visitors take advantage of on street parking facilities.

6.26 GVA Grimley undertook a detailed on-site survey and centre audit in Lakenheath in February 2006. The full centre audit illustrating retailer representation is set out in Appendix 6, and the summary is highlighted here in Table 6.3. Our research highlights that Lakenheath is functioning well with a number of specialist shops which attract visitors from beyond its surrounding residential areas. The centre contains only 2 convenience goods units, including a small Co-op supermarket, and a CTN store.

6.27 The service category is the most dominant within the centre with the main activities being estate agents, a Filipino restaurant, opticians, Post Office and a public house. Lakenheath only contains a single bank, a Lloyds TSB. Comparison units occupy only 3 units, including a mobile phone shop, florist and charity shop. The limited provision of comparison outlets is typical for a centre of its size. The on site survey also revealed there to be only 1 vacant unit, which is a positive indicator for the centre and suggests that the centre is serving its localised catchment area well.

Table 6.3: Retail Composition, Lakenheath

Retail Category	No. of Outlets	% of Total
Convenience	2	11
Comparison	3	17
Service	11	56
Vacant	1	5.5
Miscellaneous	1	5.5
TOTAL	**18**	**100**

Source: GVA Grimley On-Site Survey, February 2006

6.28 The village centre is protected by Conservation Area status which helps Lakenheath retain its village character and ensures a safe and pleasant environment in which to shop. Shop fronts are generally well maintained and street paving is of a good standard. The level of vacancies will need to be monitored so that the centre preserves is localised role and function. Ongoing investment is likely to be required to ensure that Lakenheath retains its traditional character.

SUMMARY

- We consider that Mildenhall is fulfilling its role as a local top up food destination, and the number and variety of shops in is adequate for the scale of the centre. The high proportion of service retailers may be a cause for concern in the future, particularly if this sector continues to grow at the expense of comparison and convenience retailers, thereby undermining the retail function of the centre. The managed Precincts shopping centre is in need of refurbishment, ore even redevelopment, to ensure that it adds to, rather than detracts from the overall shopping environment.
- Brandon is trading adequately, with a reasonable range of convenience and service facilities, suggesting that the centre is serving its catchment with an adequate range of ‘everyday’ requirements. The high proportion of vacant units is a concern for the centre, although the recent investment in Brandon is helping to stem this ongoing trend. The arrival of a new clothes shop suggests an improvement in the retail offer in the centre, although this will need to be monitored. The reoccupation of the vacant former Co-op store, will also add more convenience variety to the centre and will prevent people travelling to the out of centre Tesco located on London Road, encouraging linked trips in the town centre.
- We consider that Lakenheath provides a good range of ‘everyday’ goods to meet the needs of the local catchment. The centre is smaller than both Mildenhall and Brandon and will need to ensure it retains its current role in the retail hierarchy through ongoing monitoring and investment.

LAKENHEATH VILLAGE CENTRE - SURVEY 2006

	Fascia	Description	Category	Use Class
1	Network Communications	Mobile Phones	Comparison	A1
2	Charity Shop	Charity	Comparison	A1
3	Matthews	Florist/Garden Centre	Comparison	A1
4	Co-op	Convenience Store	Convenience	A1
5	Your Ideal Shop	CTN	Convenience	A1
6	Post Office	Post Office	Miscellanous	A1
7	Tumfills (Fish and Chips)	Takeaway	Service	A5
8	Touch of Elegance	Nail and Beauty	Service	A1
9	Studio Hair	Hairdressers	Service	A1
10	Michael Denny and Sons	Funeral Directors	Service	A1
11	R&B Property Agency	Estate Agents	Service	A2
12	Shires Estate Agents	Estate Agents	Service	A2
13	Lloyds TSB	Bank	Service	A2
14	Filipiniana	Restaurant	Service	A3
15	The Brewers	Public House	Service	A4
16	Charlie's Kebab House	Takeaway	Service	A5
17	Opticians	Opticians	Service	D1
18	Vacant	Vacant	Vacant	

Source: GVA Grimley On-Site Surveys

Breakdown
9 - A1
3 - A2
1 - A3
1 - A4
2 - A5
1 - D1
1 - Vacant

3 - Comparison
4 - Convenience
1 - Miscellanous
10 - Service
1 - Vacant