

# Fenland District Council FENLAND DISTRICT RETAIL STUDY UPDATE: VOLUME 1 - MAIN REPORT



Final Report  
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## Glossary

<b>Abbreviation</b>	
CAT	Competition Appeal Tribunal
CLG	Communities and Local Government
COICOP	Classification of Individual Consumption by Purpose
Comparison shopping	The provision of items not obtained on a frequent basis. These include clothing/footwear, furniture and household goods, DIY and decorating goods, electrical items, and recreational and specialist goods ('non-food' shopping)
Convenience shopping	The provision of everyday essential items, including food and groceries, drinks, newspapers/magazines and confectionary ('food' shopping)
DPD	Development Plan Document
FDRS	Fenland District Retail Study
LDF	Local Development Framework
LPA	Local Planning Authority
MHE	Management Horizons Europe
OCA	Overall Catchment Area
ODPM	Office of the Deputy Prime Minister
OFT	Office of Fair Trading
PPS	Planning Policy Statement
RSS	Regional Spatial Strategy
RTP	Roger Tym & Partners
SFT	Special Forms of Trading
SOCD	State of the Cities Database



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# 1 PURPOSE OF THE STUDY AND STRUCTURE OF THE REPORT

## Purpose of the Study

- 1.1 Roger Tym & Partners (RTP) undertook the Fenland District Retail Study (FDRS) in 2006, and submitted its final report to Fenland District Council in August 2006. The report provided forecasts of floorspace requirements for both the comparison and convenience retail sectors in the period to 2021, and contained bespoke advice on opportunities for meeting the identified quantitative need.
- 1.2 Since we completed the FDRS, Experian and Pitney Bowes MapInfo<sup>1</sup> have each released publications which advocate the use of different rates of expenditure growth and annual efficiency gains to those that we utilised in 2006. Intelligence on the use of other data inputs such as special forms of trading has also improved since the 2006 study. Furthermore, more up-to-date population and expenditure data, and revised population projections, are now available for the District.
- 1.3 Reflecting these changes and the availability of new data, as referred to above, the District Council commissioned RTP to update the quantitative food and non-food retail capacity forecasts that we produced in 2006, using updated data inputs and rolling forward the capacity forecasts to 2026. We have not, however, undertaken a new household survey as part of our Update, due to the absence of any major retail developments since our 2006 survey with the potential to materially alter shopping patterns, either within or outside of Fenland.
- 1.4 Our 2006 FDRS also provided an initial assessment of a range of potential opportunity sites for meeting the identified retail needs. As part of our Update, we revisit our initial advice and provide a broad review of opportunities for accommodating identified retail needs within the District. To set the context for our assessment, we also provide an update of the health checks, which we undertook for the FDRS, and we thus consider how each of the four study centres (Wisbech, March, Chatteris and Whittlesey) has changed over the last three years, based on an analysis of core performance indicators. Finally, we also update our assessment of the scope for additional commercial leisure provision in the District.
- 1.5 It should be noted that this report updates and thus supersedes our 2006 study. The findings from this Update Study will be used to inform the Council's emerging Local Development Framework and will also now be utilised by the Council when assessing planning applications for retail development within the District.

## Structure of Our Report

- 1.6 The remainder of our report is structured as follows:
  - Section 2 provides a review of recent and emerging changes in national planning policy.
  - Section 3 sets out the findings from our updated assessment of the performance and health of the four study centres.
  - Section 4 provides our updated quantitative comparison and convenience retail capacity forecasts.
  - Section 5 sets out our assessment of the scope for further commercial leisure development in the District.

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<sup>1</sup> MapInfo was acquired by Pitney Bowes in 2007, and is now known as 'Pitney Bowes MapInfo'. Both Experian and Pitney Bowes MapInfo are leading data analysts and information providers, and both have in-depth intelligence relating to retail and leisure expenditure and projected growth in expenditure.

- Section 6 outlines our assessment of potential opportunities for accommodating the identified retail needs within Fenland.

1.7 Our overall report to the Council comprises two volumes as follows:

Volume 1 - Main Report

Volume 2 - Appendices to the Main Report, which includes:

Appendix 1 - Retail and Leisure Capacity Spreadsheets

Appendix 2 - Performance Analysis: Indicators, Methodology and Data Sources

Appendix 3 - Performance Analysis Data

Appendix 4 - Plans showing the Location of Existing Commercial Leisure Facilities

Appendix 5 - Initial Appraisal of the Acre Road Site in March

Appendix 6 - Selected Case Studies of Town Centre Redevelopment Schemes  
(Comparable to the One That We Recommend for March)



## 2 THE REQUIREMENTS OF NATIONAL POLICY

### PPS12: Local Spatial Planning (June 2008)

- 2.1 This Update will form part of the evidence base upon which the Council will draw in developing its LDF and, in particular, its Core Strategy DPD. Section 4 of the new PPS12 explains the intended nature of core strategies, gives advice on their preparation and introduces a new test of soundness. For the purposes of this report, we focus on the nature of core strategies and the test of soundness, rather than on the preparation process.

#### *Nature of Core Strategies*

- 2.2 Paragraph 4.1 of PPS12 requires that each core strategy must include:
- i) an overall **vision** which sets out how the area and the places within it should develop;
  - ii) **strategic objectives** for the area, focusing on the key issues to be addressed;
  - iii) a **delivery strategy** for achieving these objectives, which should set out how much development is intended to happen, where, when and by what means it will be delivered and with locations for strategic development indicated on a key diagram; and
  - iv) clear arrangements for **managing and monitoring** the delivery of the strategy.
- 2.3 In turn, the '*vision*' should be in general conformity with the RSS and closely relate to the Sustainable Community Strategy (paragraph 4.2 of PPS12), and the '*strategic objectives*' should form the link between the '*vision*' and the '*delivery strategy*' (paragraph 4.3 of PPS12).
- 2.4 PPS12 then emphasises that it is the delivery strategy which is central to the process. Paragraphs 4.4 and 4.5 indicate that the delivery strategy must:
- i) show how the objectives will be delivered, whether through actions taken by the Council as a planning authority, or through actions taken by other parts of the Council, or other bodies;
  - ii) set out, as far as practicable, when, where, and by whom these actions will take place;
  - iii) demonstrate that the agencies/partners necessary for its delivery have been involved in its preparation and that the resources that are required have been given due consideration;
  - iv) have a realistic prospect of being provided in the life of the Core Strategy; and
  - v) make clear spatial choices about where developments should go in broad terms.

#### *Strategic sites*

- 2.5 Paragraph 4.6 of PPS12 states that Core Strategies may allocate strategic sites for development, provided these sites are '*...considered central to achievement of the strategy*'; the strategy should not be held up by the inclusion of non-strategic sites. Where Core Strategies do allocate strategic sites, they must include a submission proposals map, but preferably with the sites delineated in outline, rather than in detailed terms (paragraph 4.7 of PPS12).

#### *Infrastructure*

- 2.6 Paragraph 4.8 of PPS12 states that:

*'The core strategy should be supported by evidence of what physical, social and green infrastructure is needed to enable the amount of development proposed for*

*the area, taking account of its type and distribution. This evidence should cover who will provide the infrastructure and when it will be provided.'*

2.7 Thus, the infrastructure planning process that forms part of the evidence base to the Core Strategy should identify, as far as possible:

- i) infrastructure needs and costs;
- ii) phasing of development;
- iii) funding sources; and
- iv) responsibilities for delivery.

2.8 Paragraph 4.10 makes it plain that the Core Strategy should make proper provision for uncertainty and not place reliance on critical elements of infrastructure whose funding is unknown; it states that:

*'The test should be whether there is a reasonable prospect of provision. Contingency planning - showing how the objectives will be achieved under different scenarios - may be necessary in circumstances where provision is uncertain.'*

2.9 Paragraphs 4.11 and 4.12 of PPS12 make it clear that there is a need to identify the infrastructure requirements of any strategic sites and that the Core Strategy should include policies for charging the Community Infrastructure Levy (CIL), in anticipation of when such powers come into effect.

#### *Period of operation*

2.10 The time horizon of a core strategy should be at least 15 years from the date of its adoption. The strategy should build in flexibility by considering the implications of different levels of development, so as to reduce the risk of unnecessary updates.

#### *Test of Soundness*

2.11 Paragraph 4.54 of PPS12 introduces a new test of 'soundness' for core strategies, as follows:

*'To be "sound" a core strategy should be justified, effective and consistent with national policy.'*

*"Justified" means that the document must be:*

- *founded on a robust and credible evidence base*
- *the most appropriate strategy when considered against the reasonable alternatives.*

*"Effective" means that the document must be:*

- *deliverable*
- *flexible*
- *able to be monitored'*

2.12 Thus, the PPS12 places more emphasis on the need for DPDs to:

- i) *'...demonstrate that the plan is the most appropriate, when considered against reasonable alternatives'.* (Paragraph 4.38 of PPS12, our emphasis); and
- ii) *'...show how the vision, objectives and strategy for the area will be delivered and by whom, and when'.* (Paragraph 4.45 of PPS12, our emphasis).

### **Potential Changes to National Policy**

2.13 Below, we summarise several documents which reflect the current direction of thinking on various retail policy issues, although it should be noted that the issues identified do not yet represent formal national retail planning policy.

### *White Paper - Planning for a Sustainable Future (May 2007)*

- 2.14 Paragraph 7.55 of the May 2007 White Paper, Planning for a Sustainable Future, announced the Government's intention to undertake a partial review of PPS6 so as to *'...replace the need and impact tests with a new test which will have a strong focus on our town centre first policy, and which promotes competition and improves consumer choice avoiding the unintended effects of the current need test'*. Similarly, paragraph 7.56 of the White Paper envisaged that any changes to PPS6 would also take account of the conclusions of the Competition Commission's investigation of the UK's grocery sector.
- 2.15 However, the Proposed Changes to PPS6 (July 2008) represents a half-way house, in that proposals are put forward in relation to a new *'impact test'*, but not in relation to the *'competition test'* advocated by the Competition Commission (because of the ongoing legal challenge to the latter's recommendations). Thus, before we summarise the Proposed Changes to PPS6, we first outline the Competition Commission's key recommendations.

### *Competition Commission's Investigation of the UK Grocery Market (April 2008)*

- 2.16 The Competition Commission published the findings of its investigation of the UK grocery market in April 2008. The Commission's key recommendations are that:
- i) The Department of Communities and Local Government (CLG) should take such steps as are necessary to make the Office of Fair Trading (OFT) a statutory consultee for all applications for grocery stores in excess of 1,000 sq.m sales area (including applications for extensions which would cause the post-implementation sales area to exceed 1,000 sq.m).
  - ii) The OFT should provide advice to the LPA on whether a particular retailer has passed or failed a 'competition test'. A grocery retailer would fail the test if:
    - a) it was not a new entrant to the local area (defined by a ten minute drive time); and
    - b) the total number of fascias in the local area were three or fewer; and
    - c) the retailer would have 60 per cent or more of the groceries sales area in the local area.
  - iii) The CLG should take such steps as are necessary to ensure that LPAs take account of the OFT's advice on the result of the competition test and that LPAs may only determine planning applications in a manner inconsistent with that advice where they are satisfied that:
    - a) *'the particular development would produce identified benefits for the local area that would clearly outweigh the detriment to local people from the area becoming or remaining highly concentrated in terms of grocery retailing; and*
    - b) *the development, or any similar development, would not take place without the involvement of a large grocery retailer that had failed the competition test.'*
- 2.17 Nevertheless, the Competition Commission makes it clear that:
- i) it does not envisage the competition test being a replacement for the need test (paragraph 11.134 of the CC report);
  - ii) its remedies are additional to the reforms mooted in the Planning White Paper and *'...do not preclude any of the reforms proposed in the Planning White Paper in any way'* (paragraph 11.135 of the CC Report); but that
  - iii) LPAs should *'...take greater account of competition in their development plans'* (paragraph 11.135 of the CC report).

- 2.18 Tesco subsequently lodged an appeal to the Competition Commission's findings, arguing that the new 'competition test' was unnecessary and would harm consumers rather than help them. In March 2009, the Competition Appeal Tribunal (CAT) ruled in favour of Tesco, on the basis that the Competition Commission had not fully assessed and taken into account the risk that the new test might harm customers. The CAT also said that the Commission had not properly evaluated whether the costs of introducing the competition test would outweigh any benefits it might bring. The Competition Commission now has six months (from April 2009) to reconsider its proposals for introducing a competition test into the planning system.

#### *Proposed Changes to PPS6 (July 2008)*

- 2.19 The proposed changes to PPS6 were published for consultation on 10 July 2008. In the Ministerial Foreword, the Secretary of State makes it plain that the proposals are *'...not about revisiting the fundamentals of the policy. It is about improving the effectiveness of our policies, refining the framework so that it helps us achieve the aims of promoting vibrant, viable town centres more successfully.'*
- 2.20 Thus, Part 1 of the Proposed Changes document sets out the background to the proposed changes, through cross-reference to the Planning White Paper of May 2007. The latter had announced the Government's intention to *'...replace the need and impact tests with a new test which will have a strong focus on our town centre first policy, and which promotes competition and improves consumer choice avoiding the unintended effects of the current need test'*. As a consequence, the two objectives of the revisions, as foreshadowed in the White Paper, are to:
- i) *'...support current and prospective town centre investment, which contributes to economic prosperity and to our social and environmental goals';* and
  - ii) *'...to ensure that planning promotes competition and choice and does not unduly or disproportionately constrain the market'*.
- 2.21 The remainder of Part 1 sets out the form of the proposed changes and confirms that the Government's response to the Competition Commission's report will be published shortly. Part 2a sets out in detail the proposed changes to Chapters 1 and 2 of PPS6, Part 2b provides a proposed replacement Chapter 3 of PPS6, and Part 2c sets out consequential changes to the text of Chapter 4 of PPS6. We draw attention to the following matters.

#### *Retention of all five PPS6 tests in the development plan process*

- 2.22 Part 1 confirms that there is no change to the requirement for local authorities to apply all five of the existing PPS6 tests in the development plan formulation process.

#### *Removal of the need test in the development control process*

- 2.23 Part 1 also confirms the removal of the need test in the development control process, for which we provide further comment later in this section.

#### *Retention of the sequential test*

- 2.24 Paragraphs 3.13 to 3.19 of the Consultation document retain the sequential test in the development control process, with no material change to the wording of the considerations to be taken into account compared to those set out in the equivalent paragraphs of PPS6.

#### *A new three-part impact test*

- 2.25 Paragraphs 3.19a to 3.19i of the Consultation document propose the introduction of the new impact test, the key feature of which is its broader focus on economic, social and environmental impacts, as well as strategic planning impacts, in all instances taking account of both positive and negative effects. In our assessment, the new impact test comprises three parts as now described.

*First part - key town centre impact considerations*

2.26 Paragraph 3.19e of the Proposed Changes sets out the **first part** of the new impact test by identifying five key town centre impact considerations that applicants must assess, as follows:

- i) how the proposal relates to the development plan;
- ii) impact on committed and planned in-centre investment;
- iii) whether the proposal is of an appropriate scale;
- iv) impacts on in-centre trade/turnover, taking account of current and future consumer expenditure capacity in the catchment area (our emphasis); and
- v) the extent to which the proposal will promote or undermine town centre vitality and viability, including local consumer choice and retail diversity in terms of the range, type and quality of goods.

2.27 Paragraph 3.19f proceeds to state that:

*'Where there is clear evidence that the proposal is likely to have a significant adverse impact on the town centre, taking into account the considerations in paragraph 3.19e, this will normally justify the refusal of planning permission.'*

2.28 However, the next sentence of paragraph 3.19f goes on to state that:

*'Where there are considered to be some adverse impacts, but these are likely to be outweighed by significant wider economic, social and environmental benefits...taking account of the considerations in Paragraph 3.19g...local authorities should consider such proposals favourably'.* (Our emphasis).

*Second part - wider impacts*

2.29 Thus, the considerations set out in paragraph 3.19g represent the **second part** of the impact test and require consideration of seven wider impacts, as follows:

- i) impact on allocated sites located outside town centres;
- ii) the accessibility of the proposal by a choice of modes of transport, its impact on distance travelled by car and the scope for the proposal to promote linked trips with existing centres;
- iii) the extent to which a proposal benefits deprived areas and promotes social inclusion;
- iv) net employment impacts;
- v) clawback of expenditure leakage;
- vi) the extent to which a proposal will promote or undermine economic and physical regeneration; and
- vii) the extent to which the proposal makes efficient and effective use of land, including the re-use of previously developed land.

2.30 We note, at this stage, that the considerations set out in paragraphs 3.19e and 3.19g of the consultation document are also to be taken into account in the preparation of development plans, as per the provisions of paragraph 3.19h of the consultation document.

*Third part - design and climate change*

2.31 There is, however, a **third part** to the proposed impact test, which is set out in the second part of paragraph 3.19f of the consultation document; this states that:

*'Proposals which fail to secure a high quality and inclusive design which does not take the opportunities available for improving the character and quality of the area*

*and the way it functions, or which fail to deliver wider sustainable development objectives, in particular those on tackling climate change, are unlikely to be acceptable in impact terms, irrespective of any wider benefits which may arise from a proposal or its location'* (our emphasis).

2.32 Thus, irrespective of the wider benefits of a proposal, it may fail at the third stage because of inadequate design or because of harm to wider sustainability objectives, such as tackling climate change. Indeed, it is arguable that this should be the first part of the test, because the current drafting of the Consultation document suggests that there is no prospect of success if the design is seriously inadequate, or the harm to the climate is too great, irrespective of other benefits (so why put the effort into assessing wider impacts, if there is a fundamental flaw in the proposal with respect to design or sustainability issues).

*RTP comment on the need test*

2.33 In our assessment, we consider that there is confusion in relation to the widely reported proposed abandonment of the need test. We say this for three reasons:

- i) First, because Section 38(6) of the Planning and Compulsory Purchase Act 2004 provides that *'...if regard is to be had to the Development Plan for the purpose of any determination to be made under the planning acts, the determination must be made in accordance with the plan unless material considerations indicate otherwise.'* Thus, the Consultation document envisages that need will continue to have to be addressed as part of the development plan process; applications must be determined in accordance with the development plan (unless material considerations indicate otherwise); so how can applicants avoid consideration of need?
- ii) Secondly, because paragraph 3.19e (iv) requires applicants to take account of current and future consumer expenditure capacity in assessing impact on in-centre turnover, which again suggests that considerations of need and impact are inseparable.
- iii) Thirdly, because paragraph 3.19h requires that all of the considerations set out in paragraphs 3.19e and 3.19g should also be taken into account in the preparation of development plans and, in our assessment, such considerations do incorporate an assessment of economic, or expenditure, capacity.

*Competition and consumer choice*

2.34 The final aspect of the Consultation document that we wish to draw attention to relates to the issues of competition and consumer choice. As stated earlier, the Government's formal response to the Competition Commission's recommendations has been delayed, as a result of a legal challenge to these recommendations. Nevertheless, the proposed changes to paragraph 1.4 of PPS6 give more emphasis, not only to enhancement of consumer choice and improved productivity, but also to the concept of promotion of competition between retailers. Furthermore, paragraphs 2.18a to 2.18c of the Consultation document suggest that:

- i) successful town centres need a good mix of shops and broad range of retailer representation;
- ii) local authorities can help to support the diversification of uses in the town centre as a whole and to ensure that tourism, leisure and cultural activities are dispersed throughout the centre; and that
- iii) there is a need to promote competitive town centre environments.



### *Consultation Paper on New Planning Policy Statement 4: Planning for Prosperous Economies*

- 2.35 On 5 May 2009, the Government published for consultation a paper a new PPS4, entitled '*Planning for Prosperous Economies*', which is intended to streamline and replace existing national policy guidance as set out in PPG4 ('*Industrial, Commercial Development and Small Firms*'), PPG5 ('*Simplified Planning Zones*'), and PPS6 ('*Planning for Town Centres*'), as well as the economic development elements of PPS7 ('*Sustainable Development in Rural Areas*').
- 2.36 With regards to retail and town centres, the draft PPS4 reiterates similar proposals to those that were consulted upon in the Proposed Changes to PPS6. More specifically, the consultation draft PPS4 aims to promote the vitality of town centres, consumer choice and retail diversity. As with the Proposed Changes to PPS6, the new PPS4 proposes the removal of the 'need' test when assessing planning applications for retail development, and it advocates a more detailed 'impact' test than the one in the current version of PPS6, which will require the assessment of retail proposals against economic, social and environmental criteria.
- 2.37 We consider, however, that the Proposed Changes to PPS6 and the new consultation draft PPS4 will only have limited implications for the preparation of the Council's forthcoming Core Strategy. If the Government's proposals are approved, need would still remain an important consideration for development plan preparation purposes and it is arguable that need must remain a development control issue, because of the provisions of Section 38(6) of the 2004 Act, and the points outlined in paragraph 2.33 above.

### *Conclusions in Relation to Emerging National Policy Requirements*

- 2.38 Our overall conclusion in relation to the national policy context is that the Government intends to give more weight to the social, economic and environmental impacts of development proposals and move away from more narrowly defined single topic land use policy tests. This is reflected in the new impact test in the proposed changes to PPS6 and the consultation draft of the new PPS4, the second part of which identifies benefits to deprived areas, social inclusion, net employment impacts and the promotion of economic and physical regeneration as important factors in the assessment.
- 2.39 The Government has also made clear its intention to remove the need test in the development control context whilst giving increasingly strong emphasis to positive, proactive planning and to the delivery of schemes which tackle social exclusion, economic underperformance and a low quality of life environment.





## 3 UPDATED PERFORMANCE ANALYSES

### Introduction

- 3.1 We have undertaken a 'performance analysis' (commonly referred to as a 'health check') for each of the four largest centres in the District (Wisbech, March, Chatteris and Whittlesey), benchmarking performance against various comparator centres<sup>2</sup>. The indicators of vitality and viability that we have used are those listed in the bullets following paragraph 4.4 of PPS6, as defined in Appendix 2 of Volume 2<sup>3</sup>. The detailed quantitative data which informed our performance analyses are also contained in Appendix 2 of Volume 2, together with details of the data sources that we used.
- 3.2 Wherever possible, we have analysed each centre's performance using time-series data, which is more useful than simply presenting current data. The exercise serves two purposes: it informs the assessment of 'need' in the retail and commercial leisure sectors, as detailed in Sections 4 and 5 of our report; and it will provide the base position for future monitoring of the centres' vitality and viability.
- 3.3 The adopted Local Plan refers to *'the existing town centre shopping areas of Chatteris, March, Whittlesey and Wisbech'*. In our assessment, however, only Wisbech and March justify the term 'town centre'<sup>4</sup> and so in our performance analyses below we refer to Chatteris and Whittlesey as 'district centres'.

### Performance Analysis - Wisbech Town Centre

#### *Movement in the National Retail Rankings*

- 3.4 Table 1 of Appendix 3 shows that Wisbech's position in the national retail rankings has declined since 2000/01, when it was ranked in 368<sup>th</sup> position. Indeed, Wisbech is ranked 511<sup>th</sup> in Management Horizon Europe's (MHE) 2008 UK Shopping Index<sup>5</sup>, representing a significant 143-place slippage since 2000/01, and a fall of 129 places since 2003/04, when the centre was ranked 382<sup>nd</sup>.
- 3.5 Although this continuing decline presents some cause for concern, we note that of the comparator centres shown in Table 1 of Appendix 3, only Huntingdon and King's Lynn have improved their position in the retail rankings, whilst Peterborough has remained relatively static. Several other centres, including March, Stowmarket and Thetford, have all experienced a similar slippage in the national rankings.

#### *Diversity of Main Town Centre Uses*

- 3.6 There were 14 convenience outlets in Wisbech Town Centre at the time of Experian's latest Goad survey in October 2008, which account for 5.8 per cent of the total units in the centre (some 3.3 percentage points below the UK average). The proportion of convenience retail units has remained largely unchanged since our previous study. The town centre has just the one mid-sized supermarket, namely the 1,420 sq. m Somerfield store in the Horsefair Centre. The remainder of the convenience goods offer in Wisbech is limited to smaller, specialist retailers.

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<sup>2</sup> We have considered the performance of the same comparator centres that we assessed as part of our 2006 study. A full list of the comparator centres is set out in Table 1 of Appendix 3.

<sup>3</sup> Any references to 'Appendices' in this section of our report relate to the Appendices in Volume 2.

<sup>4</sup> Based on the PPS6 definition of a 'town centre', as set out in Table 1 of Annex A of PPS6. Chatteris and Whittlesey accord more closely with the PPS6 definition of 'district centres', which is also set out in Table 1 of Annex A.

<sup>5</sup> The Management Horizon Europe UK Shopping Index is based on a weighted count of retailer presence by location, and considers anchor stores, speciality stores, service operators and supermarkets. The 2008 Index considers some 6,720 centres in the UK.

- 3.7 However, it should be noted that the convenience offer in the town centre has been enhanced through the recent Aldi development at North End, which lies outside of the town centre boundary as surveyed by Experian. Tesco, Asda and Lidl stores are also available within a mile of the town centre.
- 3.8 The 109 comparison goods outlets account for 44.9 per cent of the total units in Wisbech Town Centre, which is almost identical to the UK average of 44.8 per cent. However, the Goad survey reveals a particular over-representation in the '*charity shops, pets and other comparison goods*' sub-category, the 18 units in this sector equating to almost double the UK average of 3.7 per cent. Representation in three of the four important clothing sub-categories is broadly in line with the UK average, although many outlets tend to operate towards the middle and, more often, the lower end of the retail spectrum.
- 3.9 The proportion of service outlets in Wisbech is also in line with the current UK average, with such uses accounting for 33.3 per cent of town centre units compared to the UK average of 33.4 per cent. The proportion of service units in the centre has increased since the previous study, although we note that there is an under-representation in the '*restaurants, cafés, coffee bars, fast food and take-aways*' sub-category.
- 3.10 The CLG's State of the Cities Database<sup>6</sup> (SOCD) shows that in 2004 Wisbech Town Centre contained 42,800 sq.m of A1 retail floorspace. Of the MHE-defined 'District' level centres that we have assessed, Wisbech has more A1 retail floorspace than Newmarket (35,800 sq.m), Diss (33,200 sq.m) and Ely (28,000 sq.m). Wisbech also has a greater quantum of A1 floorspace than the 'Major District' centre of Huntingdon. However, it should be noted that the amount of retail floorspace in Wisbech Town Centre decreased by 2,900 sq.m between 2000 and 2004, representing the largest decline in any of the comparator centres.
- 3.11 The 4,400 sq.m of financial and professional services floorspace recorded for Wisbech Town Centre in 2004 by the SOCD is in line with other District-level centres such as Newmarket, Stowmarket and Haverhill. Wisbech also has a good quantum of A3 food and drink floorspace (2,800 sq.m) in relation to the comparator centres<sup>7</sup>.
- 3.12 The position in relation to the office sector can be considered reasonably healthy; the 14,800 sq.m of office floorspace within the SOCD-defined Wisbech Town Centre area is the seventh-highest of the strategic centres that we considered, with Newmarket the only other District-level centre containing more office floorspace.

### *The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations*

- 3.13 There is some out-of-centre comparison floorspace in Wisbech, which is primarily concentrated along Cromwell Road, around one mile to the south of the town centre. Belgrave Retail Park at Cromwell Road consists of approximately 5,500 sq.m of retail warehouse units (including mezzanines), which are occupied by Halfords, Carpetright, Currys and Dunelm Mill. Adjacent to Belgrave Retail Park is a smaller non-food retail warehouse unit, occupied by Brantano (around 485 sq.m). The larger Peel Centre (circa 9,000 sq.m) is located along Elm High Road in Wisbech, and is anchored by B&Q and Anglia Home Furnishings.
- 3.14 In addition to the out-of-centre retail warehouse units, there are several out-of-centre foodstores in Wisbech, including a 4,000 sq.m Tesco supermarket and a Lidl store

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<sup>6</sup> The State of the Cities Database (SOCD) contains data on key indicators of 'urban performance', which were used in the State of the English Cities Report, published in March 2006 by the ODPM.

<sup>7</sup> The SOCD does not reflect the changes to the Use Classes Order which came into effect in April 2005, when Class A3 of the 1987 Use Classes Order, which covered restaurants, public houses, cafés, bars and takeaways, was sub-divided into three separate Classes (A3, A4 and A5). Under the 2005 reforms, only restaurants and cafés retained their A3 classification; pubs and bars were reclassified under the new Use Class A4; and takeaways were reclassified under the new Use Class A5.

along Cromwell Road, an edge-of-centre Aldi store at North End, an Asda supermarket at Leverington Road, and a Co-op foodstore at the Peel Centre.

- 3.15 There is significant pressure for additional out-of-centre food and non-food floorspace in Wisbech. Indeed, planning permission has been granted for an additional retail warehouse unit at Belgrave Retail Park (865 sq.m gross), an extension to the Tesco supermarket at Cromwell Road, and - most significantly - a new retail park at Cromwell Road of 14,000 sq.m (gross), which will comprise a mix of 'bulky' and 'open A1' retail operators, in addition to a cinema.
- 3.16 It is likely that the additional out-of-centre floorspace in Wisbech will have some impact on the vitality and viability of Wisbech town centre, and the situation must be closely monitored over the next few years. In order to reduce any potential negative impacts, opportunities should be taken to encourage linked trips between the additional out-of-centre floorspace at Cromwell Road and Wisbech town centre (for example, through the placement of information boards promoting Wisbech town centre, in the car park of Cromwell Road Retail Park).

### *The Potential Capacity for Growth or Change*

- 3.17 Physical expansion of Wisbech Town Centre is highly constrained by the River Nene (forming a physical barrier to the north-west of the primary retail area), and the A1101 Churchill Road (to the north and east of the retail area). The busy intersection of Nene Quay and Churchill Road to the immediate north of the Horsefair bus station and car park also forms a barrier to expansion of the town centre.
- 3.18 Nevertheless, we note that development to the north of this intersection has taken place in recent years, in the form of a new Aldi foodstore, and the emerging mixed-use scheme at Nene Waterfront will provide a small amount of additional retail floorspace.
- 3.19 The short term focus in Wisbech should be to attract retailers to the existing vacant units in the town centre. Over the longer term, there may be potential to amalgamate and/or extend units within the Horsefair Centre, to meet the operational requirements of more modern retailers who tend to require larger premises for their store formats than is currently offered in Wisbech. There may also be scope over the longer-term for a retail scheme on the site of Somers Road car park, and we discuss this in more detail in Section 6.

### *Retailer Representation and Intentions to Change Representation*

- 3.20 Many of the multiple retailers present in Wisbech Town Centre tend to operate within the middle and, more frequently, the lower end of the retail spectrum. The town centre's representation of national convenience multiples is limited to Somerfield, Aldi, Greggs and Julian Graves, although as mentioned above, Tesco, Asda and Lidl stores are all within a mile of the centre.
- 3.21 Wisbech has a relatively limited range of mainstream comparison retail multiples, including Burton, Dorothy Perkins, M&Co, New Look, Peacocks, QS and Yours. The 'Fashion Count' in MHE's 2008 Shopping Index indicates that 37.3 per cent of Wisbech's 'fashion' retailers can be described as '*middle*' order, 31.3 per cent are '*lower-middle*', and 17.9 per cent represent '*value*' fashion, whilst no retailers can be categorised as '*upper-middle*' fashion outlets. Thus, Wisbech attains an overall '*lower*' rating for fashion in MHE's Index.
- 3.22 Wisbech's '*lower*' ranking reflects the absence of high profile retailers, although in part this reflects the size of the town and its position in the retail hierarchy; high profile retailers tend to concentrate in higher-order centres, and both Peterborough and Cambridge can be expected to exert a significant draw over residents of Wisbech in this respect.

- 3.23 Wisbech contains a range of banks, building societies and national travel agents. There is also representation from national fast food outlets, such as KFC and Subway. However the town centre is lacking in café/bar/restaurant fascias.
- 3.24 The commercial organisation, FOCUS, collects data on documented retailer requirements (for national multiple operators), and publishes the data twice-yearly. The FOCUS database (Table 6 of Appendix 3) shows that there was a steady increase in the number of published retailer requirements in Wisbech town centre between April 2000 and October 2007, with 23 operators (a historic high for Wisbech) looking for representation in October 2007. However, this level of operator interest has since dropped off, and the number of published requirements for Wisbech has declined to just 8 operators by January 2009<sup>8</sup>. Retailers with current published requirements for representation in Wisbech include Heron Frozen Foods, Edinburgh Woollen Mill, Monsoon, Accessorize, Costa Coffee, Subway and Marstons, and our own research has also identified tentative interest from Wickes, Game, Holland & Barrett and a discount foodstore operator<sup>9</sup>.

### *Shopping Rents and Yields*

- 3.25 Zone A rents in Wisbech averaged £45 per sq.ft in June 2007, the lowest of any of the centres surveyed for which rental data are available (Tables 7a and 7b of Appendix 3). However, Zone A rental values in Wisbech have shown a 50 per cent increase since 2003, albeit from a low absolute base of £30 per sq.ft. Since 2000, other 'District' comparator centres (as defined by MHE) have seen similarly strong rental growth, including Haverhill and Thetford (each showing 43 per cent growth) and Newmarket (40 per cent growth). The lowest growth rates have been in the higher order centres of Peterborough, Cambridge and King's Lynn, which is not surprising given their high absolute starting position.
- 3.26 Table 8 of Appendix 3 shows that prime yields in Wisbech have remained relatively static at around 7.5 per cent since 2005.

### *Proportion of Vacant Street Level Property*

- 3.27 There were 30 vacant units in Wisbech Town Centre at the time of our previous study (which was based on survey data collected in 2005 by Experian). The most recent Goad survey, undertaken in October 2008, identified 29 vacant units; this is equivalent to 11.9 per cent of units in the town centre, and is close to the UK average of 11.4 per cent.
- 3.28 Some vacant units in the Horsefair Centre occupy prominent locations, such as the former Card Warehouse store close to the main entrance. Elsewhere in the town centre there are clusters of vacant units on Norfolk Street and at the junction of Nene Quay and York Row; both of these locations were identified as areas of concern in our previous study, and do not appear to have improved. Moreover, from our visits in January 2009, we have observed an increase in levels of vacancy in the town centre since the last Goad survey. The former Woolworths unit is the largest vacant unit in the town centre, and should be seen as a priority for re-occupation given its prominent position within the primary retail frontage.

### *Pedestrian Flows (Footfall)*

- 3.29 We are not aware of any formal pedestrian flow counts that have recently been undertaken in Wisbech. Our visits to the centre in January 2009 confirmed that the Horsefair Centre attracts the strongest levels of footfall in the town centre, reflecting the presence of a significant number of multiple retailers. Footfall was also noted to be reasonable along the northern side of the Market Place, and on High Street. Footfall in

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<sup>8</sup> FOCUS did not publish retail requirement data for the year 2008.

<sup>9</sup> For commercial confidentially reasons we are not able to specify the name of the interested operator.

the Market Place is likely to be aided by the presence of the town's street market, although this was not operational on the days when we undertook our visits.

### *Accessibility*

3.30 Accessibility to Wisbech Town Centre by car and public transport is good. The Horsefair bus station is centrally located adjacent to the Somerfield supermarket, although the pedestrian waiting environment could benefit from improvement. Bus route X1 operates half-hourly from Wisbech to destinations including Peterborough, King's Lynn, Norwich, Great Yarmouth and Lowestoft, and bus route X9 operates between Wisbech and Cambridge. Local bus services also serve Wisbech town centre and operate at half-hourly intervals throughout the daytime.

3.31 The town does not have a railway station, with the closest mainline station being located in Peterborough, and the closest local station in March. There are a number of public car parks located in Wisbech Town Centre, the largest of which is adjacent to the Horsefair Centre and has a capacity of circa 1,000 spaces. Further car parking is available at Church Terrace, Somers Road and at the Market Place.

### *Perception of Safety and Occurrence of Crime*

3.32 At the time of our visits we did not observe any particular issues relating to crime or anti-social behaviour in the town centre, which generally feels safe and benefits from CCTV. However, secondary areas of the town centre, particularly Norfolk Street, may benefit from enhanced lighting.

### *State of the Town Centre Environmental Quality*

3.33 The state of the town centre environment in Wisbech is mixed. Although the centre benefits from a number of very attractive buildings - particularly around Old Market, the Market Place and York Row, as well as in the environs of the castle - some areas are in need of substantial improvement. In particular, the Horsefair Centre is beginning to look tired, and the facilities serving the bus station - a key entry point to the town for many visitors - are in urgent need of improvement.

3.34 The pedestrianised Market Place enhances the public realm in this part of the town centre, although it would benefit from additional investment, such as planting and extra seating to encourage longer stays in the town centre.

3.35 Consideration should also be given to the separation of cars and pedestrians in Norfolk Street, which accommodates on-street parking bays, as well as a single through-road with narrow footpaths either side of the street. The road appears too narrow for many vehicles to navigate, which in turn compromises pedestrian safety on the narrow pavements.

### *Summary of the Performance of Wisbech Town Centre*

3.36 Most of the health check indicators suggest that the vitality and viability of Wisbech Town Centre has declined since our last retail study in 2006. We note, in particular, the following:

- the significant slippage of Wisbech in the national retail rankings, from 368<sup>th</sup> position in 2001 and 382<sup>nd</sup> place in 2004, to 511<sup>th</sup> rank in 2008;
- the relatively limited retail offer, particularly in relation to fashion retail which is highly orientated towards the 'value' end of the market;
- the dearth of quality food and drink outlets;
- the relatively low prime Zone A retail rents vis-à-vis the comparator centres, although rental rates have shown recent improvement;
- whilst the vacancy rate at the time of the last Experian Goad survey (October 2008) was similar to the level in 2006, there has since been an increase in the number of



town centre vacancies, including the substantial former Woolworths unit which occupies a prime town centre position;

- allied to the above, there remains a problem with long-term vacant units; and
- the need for improvements to the quality of the public realm in some parts of the town centre, particularly the bus station area and the Market Place.

3.37 Although we are encouraged that prime Zone A retail rents in Wisbech have recently shown signs of some improvement, and footfall in the town centre appears to be relatively stable, our performance analysis shows that Wisbech town centre is exhibiting some evidence of decline. It will therefore be important to monitor the centre's health closely, particularly given the pressure Wisbech has faced for additional out-of-centre retail development over recent years. Indeed, it will be important for the Council to continue to embrace the strong 'town centres first' message of PPS6 when considering the most appropriate locations for retail, office and leisure development in Wisbech.

## Performance Analysis - March Town Centre

### *Movement in the National Retail Rankings*

3.38 Table 1 of Appendix 3 shows that March town centre improved its position in the MHE retail rankings between 2000/01 and 2003/04, with the town climbing 105 places from 670<sup>th</sup> position to 565<sup>th</sup> position. However, March has since experienced a significant 214-place slippage, and the town centre ranked 779<sup>th</sup> position in 2008 (i.e. March now ranks lower than it did in 2000/01). The 2008 MHE Index also classifies March as a 'Minor District' centre, which represents a downgrading of the town's 'District' centre status in the 2003/04 Index.

### *Diversity of Main Town Centre Uses*

- 3.39 Experian undertook its most recent Goad survey of March in July 2008, when it identified 10 convenience outlets in the town centre. This equated to 6.5 per cent of the centre's total units, some 2.6 percentage points below the UK average of 9.1 per cent. However, the convenience offer includes a large Sainsbury's store on Creek Road, which is readily accessible from the primary retail area. Somerfield and Tesco Express stores are also present within the prime retail area, which perform a complementary 'top-up' shopping role.
- 3.40 The town centre contains 74 non-food outlets, equating to 48.4 per cent of all units, slightly above the UK average of 44.8 per cent. Representation in the important clothing and footwear sub-categories is generally in line with UK averages, although the representation is restricted to lower-market retailers, and representation in the key *'women's, girls and children's clothing'* sub-category only accounts for 5 units in the centre, equivalent to 5.5 per cent of total units (2.2 percentage points below the UK average).
- 3.41 Service outlets in March account for 34.6 per cent of town centre units, which is broadly consistent with the UK average. The *'hairdressers, beauty parlours and health centres'* and *'banks and financial services'* sub-categories are particularly well-represented numerically, the latter including several high street banks, such as Barclays and Lloyds TSB. As with Wisbech there is a shortfall in representation in the *'restaurants, cafés, coffee bars, fast food and take-aways'* sub-category, which only accounts for 11.8 per cent of units, compared to the UK average of 14.5 per cent.
- 3.42 Interrogation of the SOCD for March shows the town centre had a total of 13,100 sq.m of A1 retail floorspace in 2004, approximately one-third that of Wisbech. The total retail floorspace was the second-lowest of all the comparator centres for which data

are available, ahead only of Whittlesey<sup>10</sup>. St Ives and Stowmarket - which are both similarly ranked as 'Minor District' centres by MHE - have approximately double the quantum of retail floorspace found in March. Furthermore, we note that the amount of retail floorspace in March decreased from 14,900 sq.m in 2000, to 13,100 sq.m in 2004 according to the SOCD.

- 3.43 The SOCD also shows that March has approximately 2,500 sq.m of Use Class A2 (financial and professional services) floorspace, and just 600 sq.m of A3 (food and drink) floorspace.

#### *The Amount of Retail, Leisure and Office Floorspace in Edge-of-Centre and Out-of-Centre Locations*

- 3.44 As in Wisbech, there is pressure for out-of-centre retail development in March. There is already a small concentration of out-of-centre retailing at the March Trading Estate, including a Tesco foodstore and a Focus DIY store. The Meadowlands Retail Park also recently opened at Wisbech Road, approximately one mile from March town centre, which includes operators such as Halfords, Carpetright, Argos Extra and Mattressman.

- 3.45 The impact of the additional out-of-centre floorspace at Meadowlands Retail Park on March town centre should be closely monitored over the next few years.

#### *The Potential Capacity for Growth or Change*

- 3.46 The adopted Local Plan does not identify any development sites in March Town Centre. Nevertheless, there has been recent investment in the centre, such as the new library development to the west of High Street and the redevelopment of former industrial premises to form West End, a new DIY/garden centre at the southern end of High Street.
- 3.47 There appear to be relatively few options for further intensification or expansion of the town centre, which is restricted by the historic nature of the centre (large parts of the town are in a conservation area), and the River Nene (which runs through the centre). However, the area to the south and west of Acre Road - which is presently in use mainly as surface level car parking - may have potential for redevelopment, although we anticipate that an element of car parking will need to be retained. We provide further observations in relation to this potential opportunity in Section 6 of our main report and in Appendix 5 (in Volume 2).

#### *Retailer Representation and Intentions to Change Representation*

- 3.48 March has representation from a number of national multiple retailers, including Sainsbury's, Somerfield, Tesco Express and Lidl in the convenience sector and Birthdays, Blockbuster, Clarks, Stead and Simpson, Superdrug and WH Smith in the comparison sector. However, the majority of shops in the town are independent traders, and the comparison retail offer in March is generally focused towards the lower end of the market.
- 3.49 Operator interest for representation in March is relatively limited, and the number of published retail requirements has declined since our previous study, from 11 in 2006 to 7 in January 2009. Nevertheless, the FOCUS database identifies interest from a number of prominent retailers, such as Bon Marché, Edinburgh Woollen Mill, Peacocks, Pets at Home and Subway. Argos also features in the FOCUS list of requirements for March although we note that the retailer recently opened an 'Extra' store at the Meadowlands Retail Park at Wisbech Road, approximately a mile from the town centre. Our own survey of potential operators has identified further interest from a discount foodstore operator<sup>11</sup>.

<sup>10</sup> Note SOCD data is not available for Chatteris.

<sup>11</sup> For commercial confidentiality reasons we are not able to specify the name of the interested operator.

- 3.50 We note that some of the operators currently seeking representation in March (such as Edinburgh Woollen Mill and Peacocks) were identified in our previous retail study in 2006, and have yet to find suitable premises.

### *Shopping Rents and Yields*

- 3.51 No published time-series rental data are available for March Town Centre; therefore, it is not possible to chart the progress of prime rental values in the town on a time-series basis.
- 3.52 Prime retail yields in March have remained relatively static at between 8.75 per cent and 7.75 per cent over the period 2001-2008 (see Table 8 in Appendix 3).

### *Proportion of Vacant Street Level Property*

- 3.53 Experian last surveyed March Town Centre in July 2008, and identified 14 vacant units. This is equivalent to 9.2 per cent of total town centre units, below the UK average of 11.4 per cent. The number of vacant units appears to have increased slightly since July 2008, although we understand that the vacant former Woolworths unit has now been occupied by Heron Frozen Foods.
- 3.54 However, the majority of the units identified as vacant on the most recent Goad plan are yet to be re-occupied, and in addition there has been an increase in the number of vacant premises on High Street, including a public house, estate agents and solicitors offices. These units are located in a secondary area of the town centre and are therefore likely to be of limited interest to multiple retailers.

### *Pedestrian Flows (Footfall)*

- 3.55 We are not aware of any formal pedestrian flow counts that have recently been undertaken in March Town Centre. However, we found the centre to have strong pedestrian flows throughout much of the prime retail area, most notably along Broad Street and High Street (particularly in the vicinity of the Market Place), as well as between Broad Street and the Sainsbury's foodstore. Although part of the Local Plan-defined primary retail frontage, pedestrian flows were quiet between the town centre and the Lidl store on Dartford Road, suggesting this store may not generate a significant number of 'linked trips' with other town centre retailers. Consideration may need to be given as to whether this area should remain classed as primary shopping frontage.
- 3.56 We also found the secondary areas of the town centre to be considerably quieter than the prime retail area when we visited the town centre, particularly the area to the south of George Street.

### *Accessibility*

- 3.57 March Town Centre is well served by a number of bus routes, and connections are available to Peterborough, Whittlesey, Wisbech, Ely and Cambridge. A local service to a number of residential areas also runs hourly. Bus interchange facilities are located on Broad Street, in the absence of a dedicated bus station serving the town centre. This can lead to considerable congestion on Broad Street, which is itself a busy thoroughfare for motorists.
- 3.58 March railway station is approximately a 15 minute walk from the town centre, with hourly connections to Peterborough, Leicester, Birmingham, Cambridge and Stansted Airport. The town is also served by a small number of direct services to London.
- 3.59 The town centre can be easily accessed by car from the A141 and B1099. However, as noted above, traffic congestion is a considerable issue in parts of the town centre, particularly Broad Street and the River Nene crossing into High Street. The main town centre car parks are located at City Road/George Street (circa 240 spaces combined) and Sainsbury's (approximately 200 spaces).



### *Perception of Safety and Occurrence of Crime*

- 3.60 We found little evidence to suggest that March Town Centre suffers from significant crime or anti-social behaviour. The town centre benefits from CCTV coverage and street lighting is generally sufficient. The relatively quiet area of Dartford Road may be less welcoming outside of retail hours.

### *State of the Town Centre Environmental Quality*

- 3.61 March is a clean, well-maintained and pleasant centre, which has benefited from investment in the public realm. Most of the buildings in the town centre are attractive and much of the centre is within a Conservation Area. However on the south side of the River Nene a number of retail units appear slightly run down and in need of refurbishment. Gateway approaches to the centre are generally good, and street surfacing is adequate. We do not consider there to be any major issues in respect of environmental quality in March Town Centre.

### *Summary of the Performance of March Town Centre*

- 3.62 March Town Centre continues to perform relatively well against most indicators, with strong pedestrian flows throughout much of the centre and a low (albeit rising) level of unit vacancy in the core area. The town centre also benefits from a generally pleasant physical environment and there is little evidence of crime or anti-social behaviour. The centre's convenience retail offer is good due to the presence of Sainsbury's, Somerfield, Lidl and Tesco Express stores. The centre also contains a range of service sector uses, although there is an under-provision of food and drink outlets relative to the UK average.
- 3.63 Nevertheless, we have identified some areas of concern. The comparison retail offer is relatively limited, which helps to explain why March experienced a significant 214-place slippage in the national rankings between 2004 and 2008. Secondary areas of the town centre appear to have significantly less footfall than core areas, and High Street appears to be showing some signs of decline.
- 3.64 Operators such as Edinburgh Woollen Mill and Bon Marché are apparently still interested in March. A development scheme to provide new units which complement the small-scale, historic nature of much of the town centre's existing property would help to meet this demand and bolster the town centre's vitality and viability. In Section 6 and Appendix 5, we therefore provide our initial thoughts regarding a potential area of opportunity at Acre Road, which is close to the town centre core.
- 3.65 Given the pressure that March, like Wisbech, has faced for additional out-of-centre retail development over recent years, it will be important for the Council to continue to embrace the strong 'town centres first' message of PPS6 when considering the most appropriate locations for retail, office and leisure development in the town.

## **Performance Analysis - Whittlesey District Centre**

### *Movement in the National Retail Rankings*

- 3.66 Whittlesey was not ranked in the MHE Indexes of 2000/01 or 2003/04 due to its small size. MHE's 2008 Index contains a greater number of centres than previous Indexes and ranks Whittlesey at 3,120<sup>th</sup> position. As a 'Minor Local' centre (as categorised by MHE), Whittlesey is the lowest-ranked of the comparator centres.

### *Diversity of Main Town Centre Uses*

- 3.67 As no Goad survey of Whittlesey has recently been undertaken by Experian, our assessment of the diversity of uses is based on surveys of the centre which we undertook in January 2009, alongside information from the SOCD.

- 3.68 Whittlesey has 9 convenience outlets, equivalent to 8.7 per cent of units in the centre, marginally below the UK average of 9.1 per cent. Of the six convenience sub-sectors, all are represented in Whittlesey, apart from *'off-licences and home brew'*. The closure of the Kwik Save supermarket, however, means that foodstore representation is now limited to a Somerfield store and a small Nisa outlet.
- 3.69 There are a total of 41 comparison goods stores in the centre, equivalent to 39.8 per cent of total units. This is approximately 5 percentage points below the UK average, although this is typical for centres of Whittlesey's size, and should not be considered a particular cause for concern. There is relatively limited representation from fashion stores, although we note that representation in the *'women's, girls, children's clothing'* sub-sector accounts for eight units in the centre, which is equivalent to 7.8 per cent of units in the centre, significantly above the UK average of 5.5 per cent.
- 3.70 The proportion of units given over to service uses in Whittlesey is also 38.8 per cent, which is 5.4 percentage points above the UK average. The majority of service sub-sectors are broadly in line with UK averages, although we note that the *'hairdressers, beauty parlours and health centres'* sub-category, which accounts for 10 units in the centre, is over-represented by 2.3 percentage points compared to the UK average.
- 3.71 According to the SOCD, Whittlesey contained 7,700 sq.m of Use Class A1 retail floorspace in 2004, representing a reduction from 9,000 sq.m in 2001. The amount of A2 floorspace has remained broadly unchanged, decreasing slightly from 1,300 sq.m in 2000/2001 to 1,200 sq.m in 2004. The amount of office floorspace in the centre has also decreased, from 2,400 sq.m in 2000 to 2,100 sq.m in 2004.

#### *The Potential Capacity for Growth or Change*

- 3.72 Reflecting Whittlesey's role in the retail hierarchy, there has been relatively little recent development activity in the centre, and we do not consider there to be any realistic scope for expansion. Indeed, as was noted in our previous study, whilst the boundary of the centre (as defined in the Local Plan) appears to remain accurate, consideration should be given to the need to designate primary retail frontage in the centre, given the considerable number of services and non-retail uses in core areas.
- 3.73 The priority for Whittlesey should be the re-letting of the 12 vacant units in the town centre. The size of the retail units in Whittlesey is generally small and this reflects the role and status of the town in the local retail hierarchy. We do not expect significant demand to exist for larger-specification units.

#### *Retailer Representation and Intentions to Change Representation*

- 3.74 Reflecting Whittlesey's position in the retail hierarchy, there are few national multiple retailers in the centre. The Somerfield store on Blunts Lane is the only supermarket in the centre following the closure of the Kwik Save store in 2007. There is also a small Nisa Local store on Broad Street. Comparison multiples are restricted to branches of Alliance Pharmacy and Vantage Pharmacy. There is, however, a strong presence of banks and building societies in the centre, with Barclays, Lloyds TSB, Natwest, Nationwide and Norwich & Peterborough Building Society all present.
- 3.75 There are currently no retailer requirements for Whittlesey listed on the FOCUS database, although our own research has identified possible interest from Tesco and a discount foodstore operator<sup>12</sup>. We also understand that a public house operator has expressed an interest in the vacant George Hotel.

#### *Shopping Rents and Yields*

- 3.76 Published time-series rental and prime yield data are not available for Whittlesey.

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<sup>12</sup> For commercial confidentiality reasons we are not able to specify the name of the interested operator.

### *Proportion of Vacant Street Level Property*

- 3.77 There were 12 vacant units across the centre in January 2009: two units on High Causeway; four on Market Street; four fronting Market Place (although these were not all retail units); one on Eastgate; and one unit on St Mary's Street. This equates to a vacancy rate of 11.7 per cent, which is similar to the UK average of 11.4 per cent.

### *Pedestrian Flows (Footfall)*

- 3.78 We are not aware of any recent pedestrian flow counts in Whittlesey. At the time of our visit, pedestrian flows were reasonably strong along High Causeway and Queen Street, despite the latter containing relatively little in the way of retail. Market Street was found to be moderately busy, although there was very little footfall on Broad Street (the eastern side of which is included as primary retail frontage).

### *Accessibility*

- 3.79 Access to Whittlesey by car and public transport is generally good. The centre's location on the A605 makes it easy to access by road, and there is adequate surface-level car parking at Queen Street as well as adjacent to the Somerfield store on Blunts Lane.
- 3.80 The railway station is approximately 15 minutes' walk from the centre, and occasional connections to Peterborough and Ely are available. There are also frequent bus services to Peterborough, although the service is severely reduced off-peak. Bus connections to other centres are limited.

### *Perception of Safety and Occurrence of Crime*

- 3.81 There was no indication from our visits that crime and anti-social behaviour are major problems in Whittlesey. CCTV coverage was noted, although this is largely restricted to the banks in the centre. There may be potential for improving the lighting in the Blunts Lane area.

### *State of the Town Centre Environmental Quality*

- 3.82 Whittlesey is a generally pleasant and attractive centre. Many of the buildings in the centre are of good architectural quality - particularly in the vicinity of the Market Place - and the exterior condition of most properties is very good, although a number of the buildings and shop fronts on High Causeway appear tired and in need of refreshing. Overall, the centre benefits from a clean and well-maintained environment, although it is considered that the centre would benefit from additional investment in street furniture and planting.

### *Summary of the Performance of Whittlesey*

- 3.83 Most of the 'health check' indicators suggest that Whittlesey is a generally pleasant and viable centre, which is performing relatively well for a centre of its size and status. Whilst the range of retailing on offer is limited, the centre performs adequately in terms of meeting the daily needs of local residents, albeit foodstore provision has deteriorated slightly since the closure of Kwik Save. Whittlesey can be accessed by a range of means of transport, and the public realm around the centre appears to be attractive and well maintained, although in our view further investment in the physical environment would be beneficial.

## **Performance Analysis - Chatteris District Centre**

### *Movement in the National Retail Rankings*

- 3.84 Chatteris is ranked 2,046<sup>th</sup> in MHE's 2008 Shopping Index, some 1,074 places ahead of Whittlesey (3,120<sup>th</sup> rank), although 2008 is the first Index to feature Chatteris and so time series analysis is not possible.

### *Diversity of Main Town Centre Uses*

- 3.85 Our assessment of the diversity of uses in Chatteris is based on site visits to the centre in January 2009, in the absence of an Experian Goad survey for the town. Chatteris contains a total of seven convenience units, equivalent to 10.8 per cent of the total units in the centre. A small Budgens store (which occupies the former Somerfield unit) provides the main convenience offer in the centre, with the remainder of the offer largely restricted to smaller independent retailers. Five of the six convenience goods sub-categories are represented, with the exception being *'off-licences and home brew'*. The convenience offer in Chatteris is bolstered by a Co-op store located on Bridge Street, although this store is not located within the town centre boundary, as defined by the adopted Local Plan.
- 3.86 Comparison goods retailers occupy 27 units in Chatteris, equivalent to 41.5 per cent of all units. There is representation from 12 of the 16 comparison goods sub-categories, although most of those which are present are under-represented. However, we note that the centre has a higher than average representation of retailers in the *'DIY, hardware & household goods'* and *'florists and gardens'* sub-categories.
- 3.87 The service sector is slightly under-represented in Chatteris. We note in particular that that *'restaurants, cafés, coffee bars, fast food and take-aways'* sub-category only accounts for six units in the centre, equating to 5.3 percentage points below the UK average of 14.5 per cent, and that representation in the *'estate agents and auctioneers'* sub-category is 3.8 percentage points above UK average, suggesting a degree of over-representation in this sub-sector.
- 3.88 At the time of our visit we noted eight vacant units in the centre, which equates to a vacancy rate of 12.3 per cent, slightly above the UK average of 11.4 per cent. The SOCD does not contain data on levels of retail, office and leisure floorspace in Chatteris.

### *The Potential Capacity for Growth or Change*

- 3.89 As noted above, when we visited Chatteris we identified eight vacant units in the centre. We consider that these represent the most appropriate development/re-occupation opportunities within the centre. The two sizeable adjacent vacant units fronting Park Street have particular potential in this respect, and could potentially be amalgamated to form a larger unit that may suit a wider range of prospective operators. However, we recognise that there is unlikely to be significant demand for a substantial retail scheme in Chatteris.
- 3.90 We consider that the current centre boundary as defined in the Local Plan remains accurate, although, as was identified in our previous study, consideration should be given to the appropriateness of allocating primary retail frontage in such a small centre.

### *Retailer Representation and Intentions to Change Representation*

- 3.91 There is limited representation from national multiple retailers in Chatteris, although we consider that this is normal given its role in the retail hierarchy. The only convenience multiple retailer present in the defined centre is Budgens, which operates a small store at the northern end of High Street. Comparison multiple representation is restricted to a Lloyds Pharmacy. There are also branches of Barclays and Lloyds TSB banks on East Park Street.
- 3.92 The FOCUS database does not list any requirements from retailers seeking to establish a presence in Chatteris, although our own research has identified possible interest from Tesco.

### *Shopping Rents and Yields*

- 3.93 Published time-series rental and yield data are not available for Chatteris.

### *Proportion of Vacant Street Level Property*

- 3.94 Chatteris contained eight vacant units in May 2008, which equates to a vacancy rate of 12.3 per cent. Five of the eight vacant units are within the defined primary shopping frontage on High Street.
- 3.95 As noted above, there are two large vacant units adjacent to the primary shopping frontage on Park Street which are considered to have potential for re-occupation and/or reconfiguration.

### *Pedestrian Flows (Footfall)*

- 3.96 We are not aware of any recent footfall counts in Chatteris. The centre was found to be relatively quiet at the time of our visit, with some moderate pedestrian flows noted on the western side of High Street, but low-level pedestrian activity elsewhere in the centre, including in the vicinity of the small market on Park Street.

### *Accessibility*

- 3.97 Chatteris can be accessed by car via the B1050/B1098 which both run through the centre. Some traffic congestion was observed on the High Street, and there is relatively little car parking in the centre, with the principal car park located on Furrowfields Road, east of the High Street.
- 3.98 Chatteris does not benefit from access to the rail network, with the nearest stations located at March and Ely, the latter of which has strong connections to the national network. Hourly bus connections are available to March, Wisbech, Ely and Cambridge. Bus services to Peterborough are also available but run infrequently.

### *Perception of Safety and Occurrence of Crime*

- 3.99 There was no indication from our visits that crime and disorder or anti-social behaviour are major issues in Chatteris.

### *State of the Town Centre Environmental Quality*

- 3.100 Chatteris appears to be a well-maintained and generally attractive centre. The majority of the buildings in the centre are of good quality, although there is room for some improvement. The appearance of the centre could be enhanced further through additional investment in the public realm and the refurbishment of a number of shop frontages, which are starting to look dated.

### *Summary of the Performance of Chatteris District Centre*

- 3.101 Like Whittlesey, Chatteris is a relatively small centre although it appears to be fulfilling its dual role as a tourism/local service centre reasonably well. The only supermarket in the centre is a Budgens store, the comparison offer is also limited and the centre is not particularly busy, although this is not unexpected given the small size and localised role of the centre.
- 3.102 Levels of unit vacancy in Chatteris are around the UK average, and we found the public realm to be attractive and generally well maintained. Less positively, a number of shop frontages are beginning to look slightly dated and would benefit from refurbishment, and parts of the centre - particularly around Park Street - are showing signs of decline.



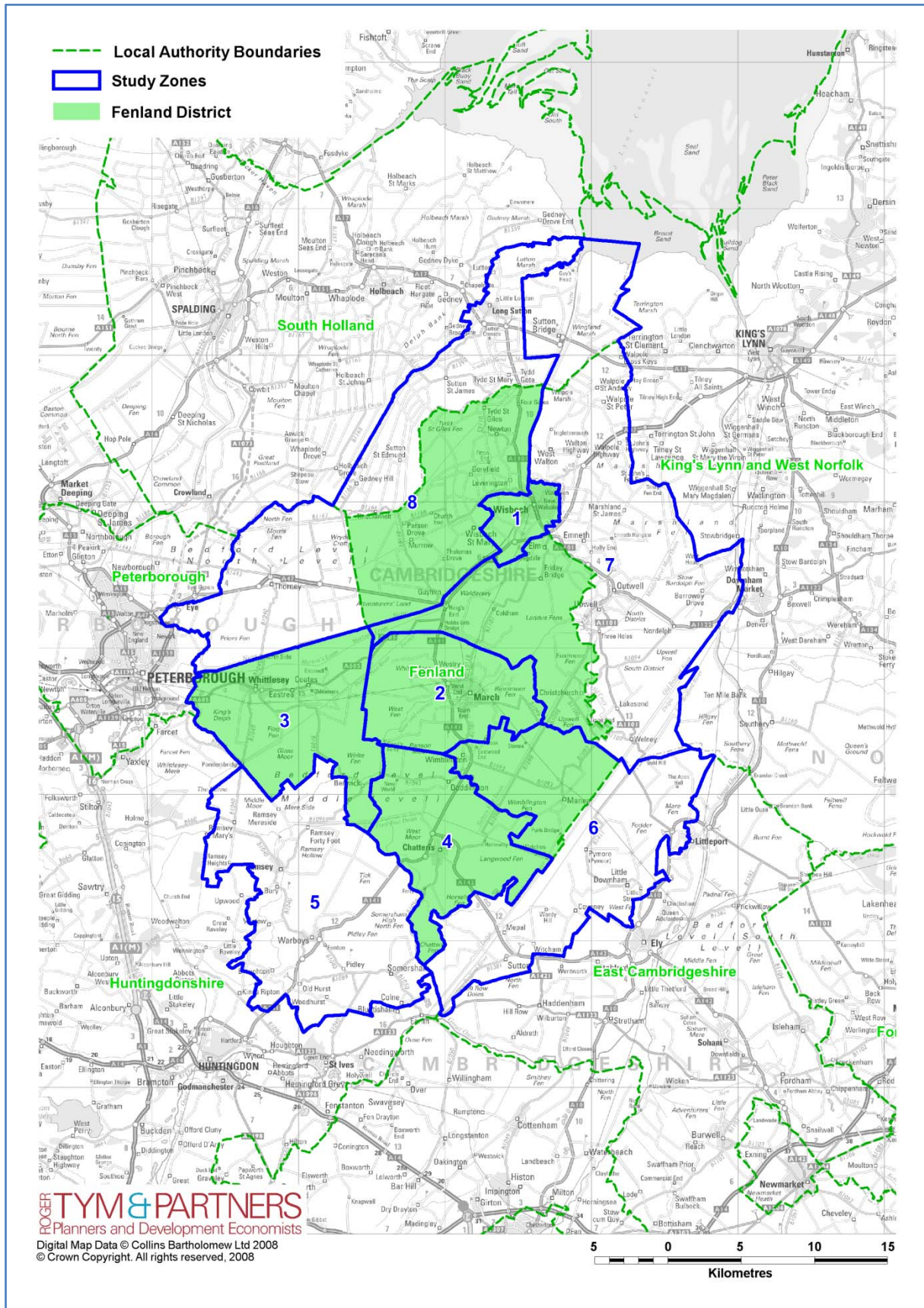
## 4 UPDATED ASSESSMENT OF QUANTITATIVE RETAIL NEED

### Introduction

- 4.1 The purpose of the 2006 FDRS was to assess the role and contribution that the District's four largest centres - Wisbech, March, Whittlesey and Chatteris - can make towards meeting future retail needs. The study was informed by a telephone survey of 1,000 households resident in eight survey zones, which covered a geographic area that is slightly wider than Fenland's administrative boundary. For ease of reference, the catchment area plan is reproduced below as Figure 4.1; the overall catchment area ('OCA') is outlined in purple, and the eight expenditure zones are outlined in blue.
- 4.2 In the 2006 FDRS, we identified floorspace requirements for both the comparison (non-food) and convenience (food) retail sectors in the period to 2021. In this update of the FDRS, we roll forward the capacity forecasts to 2026, but also provide an update of retail capacity at the forecast years of 2013, 2016 and 2021.



Figure 4.1 Fenland's Overall Catchment Area





## Key Findings from the Fenland District Retail Study (2006)

### *Comparison (Non-Food) Retail Sector*

- 4.3 The 2006 household survey showed that Wisbech Town Centre retains about 16 per cent of the overall comparison sector expenditure available to residents of the OCA, and March Town Centre retains around 6 per cent. However, the aggregate comparison retention level for all centres and stores within the OCA was found to be relatively low, at just over 28 per cent.
- 4.4 The main outflow (or leakage) of comparison expenditure is to Peterborough city centre, which accounts for 32 per cent of the available expenditure within the OCA (thus, Peterborough city centre has a higher comparison market share than the cumulative market share of all centres and stores in Fenland), followed by King's Lynn town centre (13 per cent), Cambridge city centre (6 per cent), Ely city centre (4 per cent) and Huntingdon town centre (also 4 per cent).
- 4.5 In the 2006 FDRS we provided four sets of comparison retail forecasts. Our first set of forecasts assumed a fall in the overall study area retention rate to 25 per cent by 2021; the second was based on maintaining the existing retention rate at the current base position of just over 28 per cent; the third assumed a moderate uplift in the retention rate to 31 per cent by 2021; and the fourth assumed a significant increase of the overall study area retention rate to 34 per cent by 2021.
- 4.6 We did not consider that it was sensible to plan for a downturn in the retention rate, or that significantly increasing the retention rate to 34 per cent by 2021 was likely to be achievable. These scenarios were included for illustrative purposes only.
- 4.7 The findings from the quantitative retail capacity exercise for the static retention and the moderate retention growth scenarios are summarised in Table 4.1 below.

**Table 4.1 Comparison Sector Floorspace Requirements (All Centres and Stores in the OCA)**

Floorspace Requirement (net sales area, sq.m)	2006-11	2011-16	2016-21	2006-21
<b>Static Retention (28%)</b>	971	5,563	7,466	<b>14,001</b>
<b>Moderately Increased Retention (28% to 31%)</b>	1,810	7,232	9,801	<b>18,843</b>

Source - RTP, Fenland District Retail Study (2006)

- 4.8 Our 2006 quantitative capacity work thus showed that there was substantial capacity for additional comparison sector sales floorspace in the period up to 2021, ranging from around 14,000 sq.m (150,700 sq.ft) under the 'static retention' scenario, to approximately 18,800 sq.m (202,800 sq.ft) under the 'moderately increasing retention' scenario, which we recommended should be the Council's policy aspiration target.

### *Convenience (Food) Retail Sector*

- 4.9 The household survey found that the aggregate convenience sector retention rate for the OCA as a whole was 62 per cent, which we considered to be modest. There was a relatively high level of leakage from some survey zones, particularly the zones on the periphery of the OCA. We considered, therefore, that there may be some scope for the retention rate to rise, and we suggested an increase to 65 per cent by 2011, to 68 per cent by 2016, and to 70 per cent by 2021, giving a total increase of 8 percentage points over the study period.
- 4.10 We acknowledged that some degree of expenditure leakage is inevitable, given that some parts of the OCA are located relatively close to substantial food superstores

close to, but outside of, the OCA boundary. Nevertheless, given the localised nature of convenience shopping, we considered that a retention rate of 70 per cent should be achievable.

- 4.11 Table 4.2 summarises the convenience sector floorspace capacity under the two expenditure retention scenarios. We forecast capacity for between 1,650 sq.m and 3,000 sq.m (17,800 to 32,700 sq.ft) net additional convenience floorspace by 2021 under the static retention scenario. The increased retention scenario would support additional net convenience floorspace of between 3,700 sq.m and 6,800 sq.m (40,000 to 73,300 sq.ft), in the period to 2021.

**Table 4.2 Convenience Sector Floorspace Requirements (All Centres and Stores in the OCA)**

Floorspace Requirement (net sales area, sq.m)		2006-11	2011-16	2016-21	2006-21
Static Retention (62%)	'High' Turnover per sq.m	-572	1,023	1,204	1,655
	'Low' Turnover per sq.m	-1,049	1,875	2,208	3,034
Increased Retention (62% to 70%)	'High' Turnover per sq.m	66	1,798	1,851	3,715
	'Low' Turnover per sq.m	122	3,296	3,394	6,812

## Updated Quantitative Need Assessment - Summary of Methodology and Data Inputs

- 4.12 The main steps in our update of the quantitative capacity for further comparison and convenience retail floorspace are essentially the same as those used in the 2006 FDRS. However, updated data inputs are now available (for example, relating to per capita expenditure, population and spend on special forms of trading, 'SFT'). All mentions of 'spreadsheets' below refer to the spreadsheets that are contained in Appendix 1 of Volume 2.
- 4.13 The methodology is summarised below, together with information on the various data inputs that we have used for our update of quantitative retail capacity:
- i) establish the appropriate catchment area for the centres being considered;
  - ii) assess the existing level of population and existing volume of retail expenditure of those resident within the OCA;
  - iii) establish where the expenditure of the residents of the catchment area is spent, through use of an empirical survey of households resident in the OCA, and thereby establish the proportion of expenditure which is currently retained by town centres and freestanding stores located within the catchment - that is, the current retention rate;
  - iv) apply forecasts of population change and per capita expenditure growth, so as to establish the overall level of projected growth in expenditure for residents of the OCA and an assessment of growth in retained expenditure;
  - v) allow for 'claims' on the growth in retained expenditure as a result of:
    - floorspace efficiency change (that is, the growth in turnover of existing retailers within existing floorspace);

- growth over time in SFT, mainly e-tail growth; and
  - planning commitments; and then
- vi) calculate the initial residual expenditure pot which is potentially available for new retail floorspace, based on steps iv) and v) above.

### *Step 1 - Define the Overall Catchment Area (OCA)*

- 4.14 We use the same Fenland OCA that we defined for the 2006 FDRS (as shown in Figure 4.1 above), which will ensure that the results of the updated quantitative capacity exercise can be directly compared with the 2006 findings. Although some minor retail developments have taken place within the District since we undertook the FDRS, these developments are not of a sufficient scale to materially affect the size or scope of Fenland's OCA.

### *Step 2 - Establish the Existing Level of Population and Expenditure*

- 4.15 We have sourced up-to-date population and per capita retail expenditure data from Pitney Bowes MapInfo (the data have a 2006 base date). When we undertook the 2006 FDRS, only 2003-based population and expenditure data were available.

### *Step 3 - Establish Existing Retail Spending Patterns*

- 4.16 The most detailed and up-to-date examination of shopping patterns across the entire Fenland OCA remains our FDRS of 2006, which was informed by a household survey undertaken during April and May 2006. In the absence of any major developments since the 2006 survey with the potential to materially alter shopping patterns - either within or outside of the Fenland OCA - we assume that the market shares of Fenland's centres and stores are the same in 2009 as the market shares established by the 2006 survey.
- 4.17 We recognise that there have been some changes to both the convenience and comparison retail provision in the District since the 2006 FDRS. In particular, we note that the Tesco store in March has been redeveloped, a Lidl foodstore has opened in Wisbech, and there have been a couple of small-scale non-food retail developments. However, although these changes may have had some effect on both comparison and convenience shopping patterns, as noted above it is unlikely that the overall convenience and comparison sector retention rates have been materially affected.

### *Step 4 - Forecast Growth in Retained Expenditure*

#### *Forecast growth in population*

- 4.18 Initial 2006 mid-year population data for each of the eight zones were provided by Pitney Bowes MapInfo and Oxford Economics. The population in each zone was then projected forward to the base year and forecast years using population multipliers for Fenland, East Cambridgeshire, Huntingdonshire and Peterborough derived from Cambridgeshire County Council Dwelling-led Population Forecasts (which are mid-2007-based). Population multipliers for South Holland and King's Lynn and West Norfolk were derived from the most up-to-date ONS Sub-National Population Projections (which are 2006-based, and were published in June 2008).
- 4.19 Using this method, the resident population across the entire study area is forecast to increase from 163,874 in the 2009 base year to 182,382 by 2026. This equates to a significant total population increase of 11.3 per cent over the entire 17-year period.

#### *Forecast growth in per capita expenditure*

- 4.20 Zonal per capita expenditure data were also supplied by Pitney Bowes MapInfo and Oxford Economics for the year 2006 (as set out in the top rows of Spreadsheets 3 and 10, for comparison goods and convenience goods, respectively). The

comparison and convenience goods per capita expenditure data are then rolled forward to the 2009 base year and the forecast years using the latest per capita expenditure growth rates from Pitney Bowes MapInfo and Experian, as set out in Table 4.3 below.

**Table 4.3 Expenditure Growth Per Capita (2006-2026)**

Year	No of Years	Rate Per Annum		Source
		Comparison Goods	Convenience Goods	
2006-2008	2	4.91%	2.20%	Pitney Bowes MapInfo/Oxford Economics Retail Briefings Update Revised March 2009
2008-2016	8	1.805%	0.23%	Midpoint of: (a) Pitney Bowes MapInfo forecast from Retail Spending Outlook Revised Version March 2009, and (b) Experian Retail Planner Briefing Note 6.1 February 2009 Changes, Table 3
2016-2021	5	5.85%	0.85%	Midpoint of: (a) medium term past trend from MapInfo Brief 08/02, Table 3, and (b) medium term past trend from Experian Retail Planner Briefing Note 6.1, Table 3.2
2021-2026	5	4.25%	0.45%	Midpoint of: (a) ultra long term past trend from MapInfo Brief 08/02, Table 3, and (b) ultra long term past trend from Experian Retail Planner Briefing Note 6.1, Table 3.2

- 4.21 The per capita expenditure growth rates utilised for the two year period from 2006 to 2008 represent the actual comparison and convenience goods growth rates achieved in this period, as assessed by Pitney Bowes MapInfo/Oxford Economics<sup>13</sup> in March 2009 (which are 4.91 and 2.2 per cent, per capita, per annum, respectively).
- 4.22 For the eight year period between 2008 and 2016, the midpoint<sup>14</sup> of the recent forecasts provided by Experian<sup>15</sup> in February 2009 and by Pitney Bowes MapInfo/Oxford Economics in March 2009 are adopted; 1.805 per cent per capita per annum for comparison goods and 0.23 per cent per capita per annum for convenience goods.
- 4.23 However, in their latest briefing notes, both Pitney Bowes MapInfo and Experian do not provide expenditure growth forecasts beyond 2016. Thus, in making judgments about the likely comparison goods growth rates in the five year period from 2016 to 2021, and from 2021 to 2026, we have looked back at historical growth rates, as set out in Table 1 of MapInfo Information Brief 08/02<sup>16</sup> and reproduced in Figure 4.2 below.

<sup>13</sup> Pitney Bowes MapInfo/Oxford Economics, *Retail Spending Outlook Revised Version* (March 2009)

<sup>14</sup> As the latest per capita comparison expenditure growth forecasts for the period 2008 - 2016 published by Pitney Bowes MapInfo (of 2.3 per cent) and Experian (of 1.3 per cent) differ quite significantly, we use the mid-point of the two figures (i.e. 1.8 per cent). For consistency, we adopt the same approach of using the mid-point of Pitney Bowes MapInfo and Experian figures for the later time intervals, and when assessing the growth in per capita convenience goods expenditure.

<sup>15</sup> Experian, *Retail Planner Briefing Note 6.1*, (February 2009 Changes, Table 3)

<sup>16</sup> MapInfo, *Information Brief 08/02* (October 2008)

Figure 4.2 Table 1 of MapInfo Information Brief 08/02

Table 1: UK annual average consumer retail expenditure by goods type (2003 prices)						
	Expenditure per capita (£) (percentage change from the previous year)			Price Indices (2003=100)		
	Convenience Goods	Comparison Goods	All Goods	Convenience Goods	Comparison Goods	All Goods
1981	1,422	886	2,308	43.3	62.3	50.6
	-2.2%	-1.0%	-1.7%			
1982	1,389	902	2,291	47.2	66.1	54.7
	-2.3%	1.8%	-0.7%			
1983	1,397	945	2,343	49.8	70.0	58.0
	0.6%	4.8%	2.3%			
1984	1,380	986	2,365	53.2	72.9	61.4
	-1.3%	4.3%	1.0%			
1985	1,385	1,035	2,420	55.9	77.1	64.9
	0.4%	5.0%	2.3%			
1986	1,409	1,117	2,526	58.3	79.9	67.9
	1.8%	7.9%	4.4%			
1987	1,433	1,200	2,633	60.4	82.5	70.5
	1.7%	7.4%	4.2%			
1988	1,452	1,300	2,752	62.8	85.4	73.5
	1.3%	8.3%	4.5%			
1989	1,470	1,340	2,810	66.2	89.0	77.1
	1.2%	3.1%	2.1%			
1990	1,466	1,359	2,825	71.4	93.3	81.9
	-0.3%	1.4%	0.5%			
1991	1,445	1,351	2,796	76.6	98.4	87.2
	-1.4%	-0.6%	-1.0%			
1992	1,435	1,392	2,827	79.4	100.6	89.8
	-0.7%	3.1%	1.1%			
1993	1,443	1,451	2,894	81.5	101.6	91.6
	0.5%	4.2%	2.4%			
1994	1,448	1,550	2,999	82.7	101.4	92.3
	0.4%	6.8%	3.6%			
1995	1,433	1,604	3,037	85.9	104.0	95.5
	-1.1%	3.5%	1.3%			
1996	1,468	1,687	3,156	89.1	106.3	98.3
	2.5%	5.2%	3.9%			
1997	1,480	1,779	3,259	90.1	108.3	100.0
	0.8%	5.4%	3.3%			
1998	1,477	1,877	3,354	92.1	109.3	101.7
	-0.2%	5.5%	2.9%			
1999	1,508	2,013	3,521	93.7	107.9	101.8
	2.1%	7.3%	5.0%			
2000	1,525	2,175	3,700	94.4	105.4	100.8
	1.1%	8.1%	5.1%			
2001	1,500	2,327	3,827	97.0	104.0	101.0
	-1.6%	7.0%	3.4%			
2002	1,527	2,549	4,076	98.0	102.0	100.0
	1.8%	9.6%	5.5%			
2003	1,548	2,751	4,299	100.0	100.0	100.0
	1.3%	7.9%	5.5%			
2004	1,581	2,957	4,538	100.5	97.9	98.8
	2.1%	7.5%	5.6%			
2005	1,593	3,049	4,642	101.9	95.2	97.5
	0.8%	3.1%	2.3%			
2006	1,609	3,213	4,822	104.6	93.2	97.0
	1.0%	5.4%	3.9%			
2007	1,648	3,407	5,055	108.2	91.6	97.0
	2.4%	6.0%	4.8%			

Average annual growth rates (calculated by fitting a log-linear regression line by the method of least squares to give a compound growth rate)						
1964-07	0.2%	3.9%	1.9%	7.3%	5.8%	7.0%
1973-07	0.3%	4.5%	2.4%	5.8%	4.2%	5.4%
1978-07	0.4%	5.0%	2.8%	4.3%	2.7%	3.8%
1983-07	0.6%	5.4%	3.2%	3.5%	1.6%	2.8%
1988-07	0.6%	5.6%	3.5%	2.8%	0.6%	1.9%
1993-07	0.9%	6.0%	4.2%	2.0%	-0.6%	0.7%
1998-07	1.1%	7.0%	4.7%	1.6%	-2.2%	-0.6%

- 4.24 Figure 4.2 sets out the actual comparison goods per capita expenditure growth rate for every year going back to 1981 and therefore includes the two previous recessions of the early 1980s and the late 1980s/early 1990s. Figure 4.2 shows that there have only been two years, in the past 27 years, where the comparison goods per capita expenditure change figure has been negative, these being 1981 and 1991. Furthermore, in only two further years has the comparison goods per capita growth rate dropped below 2 per cent, these being 1982 and 1990. Thus, both of the past two recessions have been followed by fairly rapid recovery in comparison goods retail spending, with the early 1980s recession followed by comparison goods growth rates which reached 7.9 per cent in 1986 and 8.3 per cent in 1988. Similarly the early 1990s recession was followed by comparison goods growth rates which reached 6.8 per cent in 1994 and 7.3 per cent in 1999.
- 4.25 Thus, the pattern of the two previous recessions has been for two years of low growth (one of which is negative), followed in succeeding years by a return to short, medium and long term past trends. On the basis of this evidence, we consider that the latest projections from MapInfo and Experian for the eight year period between 2008 and 2016 are cautious, even allowing for the apparent severity of the current recession.
- 4.26 Thus, we consider it reasonable to assume that comparison goods growth in the period 2016 to 2021 will be strong. We have therefore chosen to adopt the midpoint of the medium term past trend estimates provided by MapInfo in Table 3 of its Information Brief 08/02 (October 2008) and by Experian, as provided in Table 3.2 of its Retail Planner Briefing Note 6.1 (October 2008). The midpoints used for the 2016 to 2021 period are thus 5.85 per cent per capita per annum for comparison goods and 0.85 per cent per capita per annum for convenience goods.
- 4.27 However, for the period 2021 to 2026 we feel it is more appropriate to be cautious and we have therefore used the ultra-long term past trends which go back to 1964. Adopting the midpoint of the ultra-long term past trends from Table 3 of MapInfo Brief 08/02 and Table 3.2 of Experian Retail Planner Briefing Note 6.1, provides a comparison goods expenditure growth rate of 4.25 per cent per capita, per annum, and 0.45 per cent per capita, per annum, for convenience goods.

#### *Overall forecast growth in expenditure*

- 4.28 The total amount of expenditure available to the residents in each zone (and the OCA as a whole) is set out in Spreadsheet 4 (comparison goods) and Spreadsheet 11 (convenience goods). The third row of each spreadsheet shows the total expenditure pot in 2009, after a deduction has been made for spending on SFT (we return to this issue below). Spreadsheets 4 and 11 also project the overall level of growth in expenditure in the periods to 2013, 2016, 2021 and 2026, taking into account forecasts of population change and per capita expenditure growth, as discussed above.

#### *Special forms of trading (SFT)*

- 4.29 Special forms of Trading (SFT) is the broad term used to describe all non-store retail sales, such as sales made via the Internet, paper catalogues (mail-order), TV shopping, vending machines, and it also includes markets and road-side stalls. We have made an allowance for expenditure claimed by SFT over the study period, based on the forecasts cited by Experian in Table 5.1 of its Retail Planner Briefing Note 6.1<sup>17</sup>. In the comparison goods sector, Experian estimates that '*non-store retail sales*' will account for 12.2 per cent of total expenditure at 2009, rising to 13.9 per cent by 2013, and remaining at 13.9 per cent in 2016. Accordingly, we deduct these proportions of spend from the total 'pot' of comparison retail expenditure available within the study area. Experian only provides estimates up to 2016, at

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<sup>17</sup> Experian, *Retail Planner Briefing Note 6.1*, October 2008

which point it estimates that non-store comparison sales will plateau at 13.9 per cent. Consequently, we use this figure as our estimate of the comparison expenditure claimed by SFT at 2021 and 2026.

- 4.30 In the convenience goods sector, Experian estimates that SFT will account for 6.5 per cent of total expenditure at 2009, rising to 7.8 per cent by 2013 and 8.1 per cent by 2016. Again, forecasts are only provided until 2016, at which point it is estimated that non-store convenience sales will plateau at 8.1 per cent. However, in the convenience sector we have applied our professional judgement and have halved the proportions of expenditure accounted for by SFT (as estimated by Experian), to reflect the fact that a proportion of the convenience goods bought over the Internet are still supplied from shelves in supermarkets, rather than from distribution warehouses, as is more often the case in the comparison sector. Thus, we estimate that non-store convenience goods sales will account for 3.25 per cent of total expenditure at 2009, rising to 3.9 per cent in 2013, and 4.05 per cent in 2016, 2021 and 2026, as set out in Spreadsheet 11.

#### *Forecast growth in retained expenditure*

- 4.31 Having calculated the growth in total expenditure for all residents of the OCA, the next step is to assess the growth in retained expenditure, initially on the basis of a static retention level. Thus, the growth in retained comparison goods expenditure from 2009 to 2026, under the static market share assumption (28.5 per cent), is £135.8m (final column, Row C of Spreadsheet 7b). The growth in retained convenience goods expenditure from 2009 to 2026, under the static market share assumption (61.8 per cent), is £30.8m (final column, Row C of Spreadsheet 14a).

#### *Step 5 - Make Allowance for 'Claims' on Growth in Retained Expenditure*

- 4.32 The next step is to make an allowance for 'claims' on the growth in retained expenditure. We have already allowed for the growth in SFT, as explained in paragraphs 4.29 to 4.30 above. The remaining 'claims' are:
- i) growth in floorspace efficiency, which is growth in the turnover of existing retailers within their existing floorspace; and
  - ii) an allowance for the turnover which will be absorbed by existing planning commitments.

#### *Growth in floorspace efficiency*

- 4.33 MapInfo provides no information on anticipated change in floorspace efficiency (change in retail sales per unit sales area). Experian<sup>18</sup> puts forward a 'central case' for a change in floorspace efficiency of 2.2 per cent, per annum in the comparison goods sector and 0.6 per cent, per annum in the convenience goods sector. However, this is based on a past trends growth in comparison goods expenditure of 5.8 per cent, per annum in the period 1987 to 1999. In our assessment, the significantly lower expenditure growth rates now forecast for the period 2008 to 2016 and from 2021 to 2026 are not sufficient to support this 2.2 per cent rate of floorspace efficiency change in the future.
- 4.34 Thus, in making an allowance for growth in floorspace efficiency (Rows D and E of Spreadsheets 7a and 14a), we have adopted the floorspace efficiency changes set out in Table 4.4, which utilises Experian's 'central case' recommendations for the period 2016 to 2026, and ties the rate of floorspace efficiency change to the expenditure projections for the remaining forecast periods used.
- 4.35 The effect of the gain in floorspace efficiency of existing retailers amounts to a 'claim' of £35.4m in the comparison goods sector by 2026 (Row E of Spreadsheet

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<sup>18</sup> Experian Retail Planner Briefing Note 6.1, page 29, October 2008



7a). The corresponding effect in the convenience goods sector amounts to £9.3m (Row E of Spreadsheet 14a).

**Table 4.4 Improvements in Floorspace Efficiency from 2009 Level**

Year	No of Years	Rate Per Annum	
		Comparison Goods	Convenience Goods
2009-2016	7	0.68%	0.16%
2016-2021	5	2.20%	0.60%
2021-2026	5	1.60%	0.32%

*Allowance for planning commitments*

- 4.36 The next step is to allow for the future turnover of planning commitments, having assessed how much of the commitments' turnovers will be derived from residents of the OCA. Four planning applications for retail development have been approved and developed since the 2006 household survey was undertaken, and a number of other committed retail developments are in the pipeline, which are likely to have a significant bearing on future capacity within the OCA. All of the comparison retail commitments are summarised in Table 4.5 below, and the convenience commitments are summarised in Table 4.6 ; they also appear in Row F of Spreadsheets 7a, 7b, 7c and 7d (comparison commitments), and Spreadsheets 14a and 14b (convenience commitments). We assume that all of the retail commitments will be trading by 2013.

*Step 6 - Calculate Residual Expenditure Potentially Available for New Floorspace*

- 4.37 Spreadsheets 7a, 7b, 7c and 7d (comparison goods) and Spreadsheets 14a and 14b (convenience goods) set out the residual expenditure pot available for new floorspace, having allowed for all of the claims on the growth in retained expenditure - that is, growth over time in SFT, growth in floorspace efficiency, and existing retail commitments.
- 4.38 The spreadsheets convert the residual expenditure pot to a floorspace requirement (expressed as a net sales area), by applying an average sales density for comparison goods of £4,000 per sq.m in 2009, and an average sales density for convenience goods of £10,000 per sq.m in 2009. Finally, we convert the sales area requirement to a gross floorspace requirement, as set out in Row I of the spreadsheets, using a gross to net ratio of 70 per cent for comparison goods, and 65 per cent for convenience goods.



**Table 4.5 Comparison Retail Commitments within the Fenland OCA (as of 1 March 2009)**

Application Ref	Details of Proposal	Address	Gross Floorspace (sq.m)	Net Comp. Floorspace (sq.m)	Date Approved	Comparison Turnover from OCA at 2013 (£m)
F/YR06/0107/F	Erection of two retail units	High Street, March	315	221	05/04/2006	0.8
F/YR05/1359/F	Erection of a retail unit	Station Road, March	1090	872	10/02/2006	2.2
F/YR05/0931/F	Change of use to retail warehouse	Sandyland, Wisbech	615	257	06/10/2005	0.7
F/YR04/4401/F	Erection of a retail unit	Wisbech Road, March	2,880	2304	03/05/2005	8.3
F/YR07/0953/F	Erection of three retail warehouse units	Wisbech Road, March	2,675	1,253	19/11/2007	4.5
F/YR06/1299/RM F/YR07/0208/F F/YR07/0733/RM F/YR08/0375/F F/YR07/0056/F F/YR07/0951/F F/YR08/0427/F	Mixed use development (Cromwell Road Retail Park)	Cromwell Road, Wisbech	14,343	10,272	Various	33.2
F/YR06/0310	Extension of Tesco store	Sandown Road, Wisbech	2,381	1,889	18/04/2007	2.7
F/YR07/0056/F F/YR08/0412/F	Redevelopment of Tesco store	Hostmoor Avenue, March	6,297	3,680	04/07/2008	4.8
F/YR07/0847/F	Change of use to retail warehouse	Cromwell Road, Wisbech	665	532	17/09/2007	1.4
<b>TOTAL</b>			<b>32,534</b>	<b>21,280</b>		<b>58.5</b>

**Table 4.6 Convenience Retail Commitments within the Fenland OCA (as of 1 March 2009)**

Application Ref	Details of Proposal	Address	Gross Floorspace (sq.m)	Net Conv. Floorspace (sq.m)	Date Approved	Convenience Turnover from OCA at 2013 (£m)
0501658OUT	Tesco store	Stocking Fen Road, Ramsey	3,397	2,105	10/11/2008	12.6
F/YR06/0310	Extension to Tesco store	Sandown Road, Wisbech	2,381	1,889	18/04/2007	4.9
F/YR06/1462	Lidl store	Cromwell Road, Wisbech	1,342	1,063	07/09/2007	2.4
F/YR07/0056/F F/YR08/0412/F	Redevelopment of Tesco	Hostmoor Avenue, March	6,297	3,680	04/07/2008	15.3
<b>TOTAL</b>			<b>13,417</b>	<b>8,737</b>		<b>35.1</b>

## Quantitative Need in the Comparison Goods Sector

- 4.39 In Spreadsheet 7a, we test a scenario wherein the overall retention level decreases by around 3 percentage points over the study period, from 28.5 per cent in the year 2009, to 28.0 per cent by 2013, to 27.0 per cent by 2016, to 26.0 per cent by 2021 and to 25.0 per cent by 2026. We examined a similar 'decreasing retention rate' scenario in the 2006 FDRS. Such a scenario would reflect a contraction in the market share of the town centres located within the catchment area, whereby developments outwith the catchment area are so competitive as to more than offset the beneficial impacts of development undertaken within the catchment area. We do not consider that a deterioration in the retention rate is likely, given the significant quantum of committed retail development currently in the pipeline within the OCA. This scenario is therefore included for illustrative purposes only.
- 4.40 In Spreadsheet 7b, we set out a 'static retention rate' scenario, in which we assume that the overall retention level (of comparison goods expenditure by centres and stores within the OCA) will remain static at 28.5 per cent between 2009 and 2026.
- 4.41 In Spreadsheet 7c, we assume a moderate overall retention level increase of around 3 percentage points, from 28.5 per cent in the year 2009, to 29.0 per cent by 2013, 30.0 per cent by 2016, 30.5 per cent by 2021, reaching 31.0 per cent by 2026. We examined this 'moderately increasing retention rate' scenario as part of the 2006 FDRS, because we consider Fenland's existing retention rate of 28.5 per cent to be relatively low, and capable of improvement. In order to achieve a moderate uplift in the retention rate it will be necessary to secure new comparison retail development within the OCA of a quality which will boost the overall attractiveness of the District's retail offer vis-à-vis the competing retail locations elsewhere in the sub-region. We consider that the retail commitments currently in the pipeline within the OCA will go a long way towards achieving this uplift, once developed.
- 4.42 In Spreadsheet 7d we test our final comparison scenario whereby the overall retention level increases more significantly by about 6 percentage points, from 28.5 per cent in the year 2009, to 30.0 per cent by 2013, 32.0 per cent by 2016, 33.0 per cent by 2021 and 34.0 per cent by 2026. Again, we examined the same 'significantly increasing retention rate' scenario in the 2006 FDRS. In order to achieve this significant rise in the retention rate, additional high quality retail development, above and beyond the floorspace that is already committed within the OCA, would be required in the period up to 2026.
- 4.43 Spreadsheets 7a, 7b, 7c and 7d thus set out the quantitative comparison goods retail need for the declining, static, moderately increasing and significantly increasing retention scenarios, respectively. These quantitative needs, as set out in Rows H and I of the spreadsheets in terms of net and gross floorspace, are summarised in Table 4.7 below.
- 4.44 The capacity figures provided in Table 4.7 below are derived by applying an average sales density for comparison goods of £4,000 per sq.m (which is a 'hybrid' of the efficiency rates that are typical of local 'high street' retail developments and the lower rates that are achieved by 'bulky goods' or retail-warehouse stores) to the surplus pot of retained expenditure.
- 4.45 As Table 4.7 shows, the residual comparison goods need in the period from 2009 up to 2016 is negative in all four scenarios. This is due to the significant amount of comparison floorspace which is currently committed within the OCA, which in total will account for £59.7m of the surplus comparison expenditure capacity by 2016. Even in the period to 2021, there is still a negative residual 'requirement' for additional comparison floorspace under two of the four scenarios, although under the 'moderately increasing retention' scenario there is a small requirement for around 700 sq.m (7,500 sq.ft), and under the 'significantly increasing retention' scenario there is a relatively

modest need for around 4,650 sq.m (50,000 sq.ft) of additional comparison sector sales floorspace.

- 4.46 In the 2009-26 period, Table 4.7 shows that the overall comparison retail floorspace requirement rises considerably to around 15,900 sq.m (171,000 sq.ft) under the fourth scenario. The notional floorspace requirements for the longer-term period should be used with caution, however, as we emphasise below.

**Table 4.7 Quantitative Need in the Comparison Goods Sector (in sq.m)**

		2009-13	2009-16	2009-21	2009-26
<b>Scenario A: Declining Retention</b>	<b>Net</b>	-13,014	-12,403	-6,430	-908
	<b>Gross</b>	-18,592	-17,718	-9,186	-1,298
<b>Scenario B: Static Retention</b>	<b>Net</b>	-12,418	-10,469	-2,498	5,598
	<b>Gross</b>	-17,739	-14,956	-3,569	7,997
<b>Scenario C: Moderately Increasing Retention</b>	<b>Net</b>	-11,779	-8,491	697	10,300
	<b>Gross</b>	-16,826	-12,130	996	14,714
<b>Scenario D: Significantly Increasing Retention</b>	<b>Net</b>	-10,543	-5,883	4,657	15,904
	<b>Gross</b>	-15,061	-8,404	6,653	22,721

- 4.47 Thus, under Scenarios A to D, there is a negative residual for development of further comparison retail floorspace in Fenland in the period to 2016, although a modest need does arise under Scenarios C and D in the period to 2021, and a more substantial requirement arises under these two scenarios in the period to 2026. The limited need in the period up to 2021 is a direct result of the scale of existing comparison retail commitments in the study area. Most notably, the proposed development of an out-of-centre retail park at Cromwell Road on its own 'claims' almost 50 per cent of the surplus expenditure in the period up to 2021 (£37.8m from the total surplus of £77.5m), under the static retention rate scenario.
- 4.48 As such, we consider that the comparison retail capacity identified in Table 4.7 should be directed towards the study centres themselves, which will soon need to respond to the increasing competition provided by Cromwell Retail Park.
- 4.49 However, it is important to note that the scale of the requirement set out at the higher end of the forecast range (Scenarios C and D) arises as a result of a steady increase in the aggregate OCA retention rate over the study period. The best way to achieve this significant increase in market share is to secure high quality comparison goods development of sufficient scale and critical mass for it to generate its own need by increasing the attractiveness of Fenland's centres, vis-à-vis the competing centres outside the catchment.
- 4.50 The significant amount of committed floorspace within the OCA is likely to result in an uplift in the overall comparison retention rate, once developed. We therefore consider that the floorspace requirements arising under Scenario D are achievable, and that the Scenario D forecasts should form the basis of the Council's policy aspiration.
- 4.51 Thus, our quantitative capacity work shows that, under Scenario D, there is a goods-based capacity for up to approximately 4,650 sq.m (50,000 sq.ft) of additional comparison sector sales floorspace in the period to 2021, over and above existing planning commitments.
- 4.52 In the 2009-26 period, the overall comparison retail floorspace requirement under Scenario D increases considerably to around 15,900 sq.m (171,000 sq.ft). Thus, of the comparison retail floorspace requirements identified for the overall study period 2009-26, almost three-quarters arise in the post-2021 period. This is due to the substantial compounding effect of expenditure growth coupled with population growth, which

become greater over longer time periods, and it also corresponds with the period of higher expenditure growth that we anticipate will follow the current downturn in the economy.

- 4.53 We therefore consider that the comparison floorspace requirements identified for the period to 2021 are of more utility for strategic planning purposes than the longer-term forecasts to 2026. The latter are presented for illustrative purposes and should be used with care. Long-term forecasts, whilst valuable for strategic planning purposes, should be regarded as subject to increasing uncertainty in the later parts of the study period and should be kept under regular review.
- 4.54 In Section 5, we discuss specific opportunity sites that the Council may wish to consider for accommodating the identified retail floorspace requirements.

### Quantitative Need in the Convenience Goods Sector

- 4.55 In Spreadsheet 14a, we set out a 'static retention rate' scenario, in which we assume that the overall retention level (of convenience goods expenditure by centres and stores within the OCA) will remain static at 61.8 per cent between 2009 and 2026.
- 4.56 In Spreadsheet 14b, we test a scenario whereby the overall retention level increases by 8 percentage points between 2009 and 2026, from 61.8 per cent in the year 2009, to 64.0 per cent by 2013, 66.0 per cent by 2016, 68.0 per cent by 2021 and to 70.0 per cent by 2026. In the 2006 FDRS, we examined the same 'increased retention rate' scenario, because we consider Fenland's existing convenience retention rate of 61.8 per cent to be relatively low. We do not consider the aspiration of a 70 per cent retention rate to be unrealistic, as it is a level of retention that is typically achieved in similar locations elsewhere.
- 4.57 Spreadsheets 14a and 14b thus set out the quantitative convenience goods retail need for the static and increased retention scenarios, respectively. These quantitative needs, as set out in Rows H and I of the spreadsheets in terms of net and gross floorspace, are summarised in Table 4.8 below.

**Table 4.8 Quantitative Need in the Convenience Goods Sector (in sq.m)**

		2009-13	2009-16	2009-21	2009-26
<b>Scenario A: Static Retention</b>	<b>Net</b>	-3,103	-2,747	-2,211	-1,457
	<b>Gross</b>	-4,774	-4,227	-3,402	-2,242
<b>Scenario B: Increasing Retention</b>	<b>Net</b>	-2,534	-1,630	-504	902
	<b>Gross</b>	-3,898	-2,508	-776	1,388

- 4.58 Table 4.8 shows that in both scenarios there is a negative residual for development of further convenience retail floorspace in Fenland between 2009 and 2021. Over the longer-term period to 2026, the quantitative need for convenience retail development remains negative under the static retention rate scenario. Over the same period, there is a very modest positive residual convenience goods need under the increasing retention rate scenario of around 900 sq.m net (10,000 sq.ft), which would be sufficient to accommodate a small-sized supermarket or a couple of basket grocery stores. The additional floorspace could alternatively be provided through the extension of an existing store.

## 5 ASSESSMENT OF SCOPE FOR ADDITIONAL COMMERCIAL LEISURE PROVISION

### Forecast Increases in Leisure Expenditure

- 5.1 The approach taken by consultants to the assessment of quantitative need in the leisure sector is less well developed than in the retail sector. Furthermore, property development in the leisure sector has historically been very market-led, and it is only since the publication of PPS6 in March 2005 that leisure has been brought firmly into the range of uses covered by the sequential approach.
- 5.2 Nevertheless, Experian<sup>19</sup> and MapInfo<sup>20</sup> have published information on leisure spending in six COICOP (Classification of Individual Consumption by Purpose) categories. Analysis of the information reveals the following pattern of leisure spend across the Fenland catchment area:

**Table 5.1 Breakdown of Leisure Spend in Fenland's Overall Catchment Area in 2009**

Description	UK		Fenland OCA	
	Spend Per Capita <sup>21</sup> (£)	% of Total Leisure Services Spend	Spend Per Capita (£)	% of Total Leisure Services Spend
11.1.1 Restaurants, cafés, bars, etc	1,161	60.4%	993	54.2%
9.4.2 Cultural services	248	12.9%	244	13.3%
9.4.3 Games of chance	166	8.6%	192	10.5%
11.2 Accommodation services	132	6.9%	204	11.1%
9.4.1 Recreational and sporting services	125	6.5%	111	6.1%
12.1.1 Personal services (hairdressers etc)	90	4.7%	90	4.9%
<b>TOTAL 'LEISURE SERVICES' SPEND</b>	<b>1,922</b>	<b>100%</b>	<b>1,834</b>	<b>100%</b>

- 5.3 Table 5.1 shows that total per capita spending on leisure services in Fenland's OCA is significantly lower than the UK average, although the proportional split of expenditure between different categories of leisure service is similar to the UK profile. Moreover, we note that COICOP category 11.1.1 ('restaurants, cafés and the like') accounts for over 50 per cent of the average per capita spend on leisure services. 'Cultural services', 'accommodation services' and 'games of chance' are the second, third and fourth highest categories, and these account for 13.3 per cent, 11.1 per cent and 10.5 per cent of spending on leisure services, respectively. However, commercially oriented leisure developments, such as cinemas, account for only a small fraction of spend on

<sup>19</sup> Experian, *Retail Planner Briefing Note 6.1* (October 2008), Table 2.1.

<sup>20</sup> MapInfo, *2004 Leisure Goods & Services Expenditure at Output Area Level: Product Guide* (March 2007), and associated leisure expenditure dataset.

<sup>21</sup> Experian, *Retail Planner Briefing Note 6.0* (October 2008), Table 2.1 provides estimates of UK per capita expenditure on leisure services in 2007. We have projected the per capita expenditure data forward to 2009 (to allow comparison with Fenland in the 2009 base year) by applying an expenditure growth rate of 0.8 per cent, per annum (as specified in Table 3.2 of Experian's *Retail Planner Briefing Note 6.0*).

cultural services (5.2 per cent)<sup>22</sup>, and bingo halls and casinos account for just 7.2 per cent and 9.5 per cent of spend, respectively, of expenditure on games of chance<sup>23</sup>.

- 5.4 Bearing in mind the structure of current spend on leisure services, our next step in the assessment of leisure need is to calculate the future growth in leisure spend for residents of the Fenland catchment area in the period 2009 to 2021. We sourced year 2006 per capita leisure expenditure data from our in-house MapInfo dataset for residents of the same eight zones that we used for the retail forecasts (as depicted in Figure 4.1 on page 26). The projected growth in expenditure on leisure services, which is set out in Spreadsheet 15 in Appendix 1, is based on population growth and Experian's recommended growth rate for spending on leisure services of 0.8 per cent, per capita, per annum for the period 2008 to 2016<sup>24</sup>. For completeness, we also project leisure spend forward to 2026. However, for the purposes of planning for commercial leisure needs, we caution against looking beyond 2021.
- 5.5 Spreadsheet 15 reveals that the total expenditure on leisure services in Fenland's OCA is projected to grow from £300.5 in 2009 to £319.2m by 2013, to £333.6m by 2016, to £353.9m by 2021, and to £381.8m by 2026. Projected growth in spending on leisure services from 2009, therefore, amounts to 18 per cent in the period up to 2021 and to 27 per cent in the period up to 2026.
- 5.6 In absolute terms, the growth in leisure services spend within the catchment area from 2009 up to 2021 amounts to £53.4m, and to £81.3m by 2026. Applying the 2009 base year leisure spend shares (from Table 5.1 above), around 54 per cent of the growth in leisure spending can be expected to be absorbed by restaurants/cafés, pubs/bars and take-away outlets (i.e. £28.9m by 2021 and rising to £44.0m by 2026). In contrast, the growth that would be absorbed by '*cultural services*' would amount to just £7.1m by 2021 and £10.8m by 2026. Similarly, the growth in expenditure on '*games of chance*' up to 2021 would amount to just £5.6m by 2021 and £8.5m by 2026. However, commercial facilities such as cinemas will absorb only a proportion of the expenditure growth in cultural services, and casinos and bingo halls will absorb only a proportion of the expenditure growth on games of chance.

## Conversion of Surplus Expenditure to Additional Commercial Leisure 'Requirements'

### *Food and Drink*

- 5.7 Given the localised nature of spending on food and drink, it is reasonable to anticipate that much of the projected growth in expenditure on food and drink will be retained within the study area. The 2006 household survey demonstrated that only a minority of expenditure on pubs and restaurants - i.e. 10 per cent in relation to pubs, and just under a third of restaurant expenditure - is spent outside of the Fenland OCA. If these market shares persist, then around four fifths of the £28.9m growth in food and drink expenditure arising by 2021 will be available for new facilities located within the Fenland OCA, which equates to around £23.1m.
- 5.8 However, not all of the growth in retained expenditure will be available for new restaurants/cafés, pubs/bars and take-away outlets. In the same way that an allowance is made in the retail sector for existing operators to improve their turnover efficiency, it is reasonable to assume that some of the growth in available food and

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<sup>22</sup> The remaining spend on cultural services is accounted for by theatre visits, DVD/video rentals, social subscriptions, photographic processing and a plethora of other items, which together account for three-fifths of the spending on cultural services.

<sup>23</sup> Betting (including on the National Lottery) accounts for the greatest proportion of 'games of chance' expenditure (36.5 per cent at 2007, according to the Leisure Industries Research Consultancy).

<sup>24</sup> Experian, *Retail Planner Briefing Note 6.1*, Table 3.2 (we do not have access to the corresponding MapInfo forecasts). Experian's forecasts do not go beyond 2016; in the absence of any better information we have therefore also applied the 0.8 per cent, per annum forecast growth rate to the post-2016 period.

drink expenditure will be absorbed by existing operators (to allow them to grow their business, re-fit their premises, and so on). Unlike in the retail sector, however, there is a dearth of published advice on what proportion of expenditure growth in the food and drink sector should be ring-fenced for existing operators. In the absence of firm guidance, we have therefore allocated half of the growth in food and drink expenditure to existing restaurateurs and pub/bar operators.

- 5.9 The £11.6m 'residual' (half of the £23.1m growth in food and drink expenditure up to 2021) would be sufficient to support a range of new, good-quality restaurants - which typically generate annual turnovers of around £850,000 to £1m, but with some high-profile restaurant operators taking in excess of £1m per annum - as well as several branded pubs/bars, which typically have annual turnovers of between £800,000 and £1.2m, and possibly some smaller casual dining pubs which generally turnover less than £500,000 a year. Thus, in broad terms there would be sufficient expenditure growth to support around 10 new food and drink outlets across the OCA in the period up to 2021.

### *Cinemas*

- 5.10 Data from Dodona, and our own research into the leisure sector, suggests that the average multiplex screen accounts for an annual spend of £305k in ticket revenue, whereas an independent screen accounts for £148k per annum in ticket revenue. Thus, the £366,000 increase in cinema expenditure arising in the Fenland catchment area by 2021, as a consequence of growth in population and per capita leisure expenditure, is theoretically sufficient to support development of one screen in a multiplex format (albeit development of a multiplex facility would require provision of more than one new screen<sup>25</sup>), or two additional independent screens.
- 5.11 However, it is not sufficient to simply convert the potential growth in cinema revenue to a notional 'requirement' for screens. Cinema operators make decisions based on 'screen density' - that is, the existing cinema screen provision within appropriate drive-time isochrones, taking account of population levels (or the number of screens available per 100,000 people). The latest information that we have access to indicates that the average travel time to a cinema is around 18 minutes<sup>26</sup>. We have therefore analysed cinema provision within an 18-minute drive-time of March town centre (which is located broadly at the centre of Fenland District). The findings are reproduced in Table 5.2, and the location of cinemas within and surrounding the catchment area is shown in Figure 5 in Appendix 4.
- 5.12 Table 5.2 reveals that the population within an 18-minute drive-time of March town centre is 41,533 persons<sup>27</sup>. There is currently only one cinema within (or on the edge) of the 18-minute drive-time area, namely the one-screen Luxe Cinema in Wisbech, which mainly shows art-house and independent films. There is thus currently very limited cinema provision within Fenland District as a whole.
- 5.13 Table 5.2 below indicates that the equivalent screen density within an 18-minute drive-time of March town centre is thus only 2.4 screens per 100,000 population, which is below both the East of England average of 4.1 screens per 100,000 population, and the UK average of 5.8 screens per 100,000 population<sup>28</sup>.
- 5.14 Our analysis has, however, been undertaken on a broad basis and residents in some parts of the study area are relatively close to cinemas in Peterborough (which has a 13-screen Showcase cinema), King's Lynn (which has two small-scale facilities, providing four cinema screens in total), and Huntingdon (which has a 9-screen Cineworld). There are also several cinemas in Cambridge (including a Vue Cinema,

<sup>25</sup> Dodona defines a 'multiplex screen' as a being within a purpose-built cinema with five or more screens.

<sup>26</sup> Source: Caviar

<sup>27</sup> Year 2005; source: MapInfo

<sup>28</sup> East of England and UK average screen density figures are sourced from the UK Film Council's 'Statistical Yearbook 2008' (whose statistics are based on Dodona Research RSU Analysis).



Cineworld, and independent Arts Picturehouse), although these facilities are located over 30 miles (up to one hour's drive) from the majority of Fenland's residents.

**Table 5.2 Cinema Screen Density Within an 18-minute Drive-time of March Town Centre**

No of Cinemas Within 18 Minute Drive-time	No of Screens Within 18 Minute Drive-time	Actual Popn Within 18 Minute Drivetime	Screen Density (i.e. screens per 100,000 people)	East of England Average Screen Density	UK Average Screen Density
1	1	41,533	2.4	4.1	5.8

- 5.15 Nevertheless, whilst residents located towards the west and south of Fenland may be able to access cinemas near Peterborough, Ely and Huntingdon, residents located towards the north and centre of the study area (which is the most densely built-up part of Fenland) will have further to travel to visit a cinema. Furthermore, it is worth bearing in mind that not all young people - i.e. the main users of cinemas - have access to a car; these people might therefore find it difficult to access the out-of-centre cinemas or visit cinemas in other towns.
- 5.16 Given the deficiencies in local cinema provision outlined above, we consider that Fenland may be viewed favourably by some cinema operators as a potential location for additional cinema screen provision, despite the relative lack of quantitative expenditure capacity (as explained in paragraph 5.10 above). There would seem to be potential for a small-scale multiplex facility. We note that planning permission has been granted for a six-screen cinema at the Cromwell Retail Park site, which if built, will satisfy the qualitative need for additional cinema provision within Fenland.

### *Bingo*

- 5.17 There is one operational bingo club within the Fenland catchment area, this being the Empire Bingo and Social Club in Wisbech. The northern part of Fenland District is thus reasonably well-served by a neighbourhood bingo club, although the southern part of the District is less well-served (following the closure of the Hippodrome Bingo Club in March), and the District as a whole lacks a national bingo chain (such as Mecca or Gala Bingo). Figure 6 in Appendix 4 shows that the nearest national bingo facilities are located beyond a 25 minute drive-time of March town centre, with Gala Bingo clubs located in Peterborough, Cambridge and King's Lynn.
- 5.18 Thus, on the basis of existing provision there is perhaps a qualitative requirement for provision of an additional neighbourhood or national bingo facility within the District, particularly in the area around March. However, in quantitative terms, the additional £405,000 in bingo expenditure arising in the catchment area by 2021 would be insufficient to support a new Gala or Mecca-type club (which generate average annual net stakes of around £1.47m per branch), although it could potentially support one additional neighbourhood club, for which annual net stakes average around £444,000 per branch. More targeted market testing would be required to ascertain whether operators of neighbourhood or national bingo clubs would consider locating in the study area, and which locations might be attractive to operators.

### *Casinos*

- 5.19 The additional £535,000 in casino expenditure arising by 2021 is substantially below the level required to support a small-scale 'traditional' casino, which generate average annual turnovers of around £3.6m per casino<sup>29</sup>.

<sup>29</sup> Source: The Gambling Commission

## Summary of Scope for Additional Commercial Leisure Facilities

- 5.20 Expenditure on leisure services in the Fenland catchment area is projected to grow by £53.4m in the period up to 2021. How this growth might be expended locally depends very much on what opportunities the market supplies - thus, current spending patterns can only provide a guide to what might happen in the future.
- 5.21 On the basis of current spending levels in Fenland's OCA, over 50 per cent of this spending growth (£28.9m) will go to eating and drinking establishments (restaurants, cafés, take-away outlets and pubs/bars). Capturing a sizeable proportion of this growth in expenditure through the provision of a better and more appealing choice of restaurants, cafés and pubs/bars will be particularly vital to the future health of the two main town centres in Fenland (Wisbech and March).
- 5.22 The remainder of the growth in expenditure on leisure services will go to a wide range of activities, with no single activity capturing a significant market share. In our assessment, there appears to be no scope for a casino development in Fenland. However, the catchment area may be viewed more favourably by small-scale multiplex/independent cinema operators and neighbourhood bingo clubs, as a potential location for some additional cinema/bingo provision.
- 5.23 As we have stressed, the approach to the assessment of quantitative need in the leisure sector is less well developed than in the retail sector and so the quantitative 'needs' that we have identified should be treated as an indicative guide. Furthermore, the leisure sector is dynamic, changing and operator-led. Thus, if an investor feels capable of attracting customers by diverting spending from other facilities, the planning system does not seek to prevent additional development, provided such development meets the tests in PPS6.



## 6 OPPORTUNITIES FOR MEETING IDENTIFIED QUANTITATIVE NEEDS

### Introduction

- 6.1 The purpose of this Retail Study Update is to provide a robust evidence base on the capacity for additional retail and leisure development in forthcoming years. Fenland District Council can then use the findings to inform the preparation of its Local Development Framework, and as evidence for determining planning applications. In order to assist the Council with this, we pull together, below, the principal findings from the various lines of research and analysis that informed our Update, in order to identify key quantitative and qualitative needs. We also highlight potential locations/sites that the Council may wish to consider for accommodating the identified retail needs.
- 6.2 Firstly, we summarise the findings from our retail capacity analysis and our assessment of the need for additional commercial leisure provision, and then we consider specific opportunity sites and analyse their suitability, availability and viability (as per PPS6) for retail/leisure development.

### Summary of Key Quantitative and Qualitative Needs

#### *Comparison Retail Sector*

- 6.3 In Section 4, we presented four scenarios for establishing comparison retail need in the District up to 2026. One scenario is based on a declining rate of expenditure retention (from 28.5 per cent to 25.0 per cent), the second is based on maintenance of a static rate of retention (at 28.5 per cent), the third considers the effect of moderately increasing the retention rate (from 28.5 per cent to 31.0 per cent), and the fourth examines the effect of a more significant increase in the retention rate (to 34.0 per cent by 2026).
- 6.4 In all four scenarios, the residual comparison goods need is negative in the period 2009 to 2016, as summarised in Table 6.1 below. This is primarily due to the significant amount of comparison floorspace which is already committed within the OCA, including the proposed new retail park at Cromwell Road in Wisbech. Even in the period to 2021, there is still a negative residual 'requirement' for additional comparison floorspace under two of the four scenarios, although under the 'moderately increasing retention' scenario there is a small requirement for around 700 sq.m (7,500 sq.ft), and under the 'significantly increasing retention' scenario there is a relatively modest need for around 4,650 sq.m (50,000 sq.ft) of additional comparison sector sales floorspace.
- 6.5 In the 2009-26 period, the overall comparison retail floorspace requirement rises to around 15,900 sq.m (171,000 sq.ft) under Scenario D. Thus, of the comparison retail floorspace requirements identified for the long-term period 2009-26, around three-quarters arise in the post-2021 period, because of the substantial compounding effects of expenditure growth coupled with population growth over longer time periods, and it also corresponds with the period of higher expenditure growth that we anticipate will follow the current downturn in the economy. We consider that the longer-term forecasts to 2026 should be used with caution and that they should be kept under regular review.

**Table 6.1 Quantitative Need in the Comparison Goods Sector (in sq.m)**

		2009-13	2009-16	2009-21	2009-26
<b>Scenario A: Declining Retention</b>	<b>Net</b>	-13,014	-12,403	-6,430	-908
	<b>Gross</b>	-18,592	-17,718	-9,186	-1,298
<b>Scenario B: Static Retention</b>	<b>Net</b>	-12,418	-10,469	-2,498	5,598
	<b>Gross</b>	-17,739	-14,956	-3,569	7,997
<b>Scenario C: Moderately Increasing Retention</b>	<b>Net</b>	-11,779	-8,491	697	10,300
	<b>Gross</b>	-16,826	-12,130	996	14,714
<b>Scenario D: Significantly Increasing Retention</b>	<b>Net</b>	-10,543	-5,883	4,657	15,904
	<b>Gross</b>	-15,061	-8,404	6,653	22,721

- 6.6 It is important to note that the scale of the requirement set out at the higher end of the forecast range (Scenarios C and D) arises as a result of a steady increase in the aggregate OCA retention rate over the study period. However, we consider that the current rate of retention is relatively low and is capable of improvement, even given the close proximity of Peterborough city centre and other higher-order centres that are close to, but outside the OCA boundary. Indeed, committed floorspace which is already planned within the OCA will result in an uplift in the overall comparison retention rate, and this uplift could be extended further through the delivery of additional high quality comparison retail development. We suggest that the comparison retail capacity identified in Table 6.1 should be directed towards the study centres themselves, which will need to respond to the out-of-centre development committed in Wisbech and March.
- 6.7 In terms of qualitative need, we explained in Section 3 that both Wisbech and March town centres are currently not performing to their full potential. As in 2006, we found that a key deficiency in the comparison retail offer in both centres is the lack of breadth and depth in the clothing sub-sector, with only a small number of units and a limited range of middle-order operators. The deficiency is in large part due to the shortfall of large, modern retail units to accommodate 'high street' multiples in the centres. As a consequence, Wisbech and March appeal predominantly to a localised shopper base, which explains their low comparison sector market shares in the OCA of just 16 per cent and 6 per cent, respectively, which is lower than the proportion of comparison expenditure available in the OCA that 'leaks' to Peterborough city centre (32 per cent).
- 6.8 As such, we conclude that there is a qualitative need for enhancements in the 'high street' offer of both Wisbech and March, as the principal centres within the District, particularly in relation to middle-order clothes and shoes shops. Whilst we acknowledge that there is no comparison expenditure capacity available in the period to 2016, there is scope over the longer-term to improve the comparison retail offer of these two town centres. There is a particular need to strengthen the retail offer in Wisbech town centre, if it is to maintain its position in the face of new competition from an out-of-centre retail park at Cromwell Road.

### *Convenience Retail Sector*

- 6.9 In the convenience sector, we have provided two scenarios for establishing convenience retail need in the District up to 2026; one scenario is based on the maintenance of a static convenience rate of retention (at 61.8 per cent), and the second scenario considers the effect of increasing the retention rate from 61.8 per cent to 70.0 per cent. In both scenarios there is a negative residual requirement for convenience floorspace in the period up to 2021. Over the longer-term period to 2026, the quantitative need for convenience retail development remains negative under the static retention rate scenario. However, over the same period, there is a very modest

positive residual convenience goods need under the increasing retention rate scenario of around 902 sq.m net (10,000 sq.ft). This is summarised in Table 6.2 below.

- 6.10 The convenience retail capacity arising under the increasing retention scenario would be sufficient to support a small-sized supermarket or a couple of basket grocery stores (such as Spar). The additional floorspace could alternatively be provided through the extension of an existing store..

**Table 6.2 Quantitative Need in the Convenience Goods Sector (in sq.m)**

		2009-13	2009-16	2009-21	2009-26
<b>Scenario A: Static Retention</b>	<b>Net</b>	-3,103	-2,747	-2,211	-1,457
	<b>Gross</b>	-4,774	-4,227	-3,402	-2,242
<b>Scenario B: Increasing Retention</b>	<b>Net</b>	-2,534	-1,630	-504	902
	<b>Gross</b>	-3,898	-2,508	-776	1,388

- 6.11 In terms of qualitative deficiencies, the two largest study centres - Wisbech and March - already have healthy convenience sectors. Although Wisbech has a relatively limited food offer within its town centre boundary, convenience provision is bolstered by Aldi, Asda, Lidl and Tesco stores within a mile of the town centre. March town centre benefits from a large Sainsbury's store, which is readily accessible from the primary retail area.
- 6.12 Although the two smaller market towns - Chatteris and Whittlesey - benefit from a range of medium and small-scale convenience stores, which meet the basic 'top-up' needs of local residents, neither centre benefits from a large supermarket. As such residents must travel elsewhere for their main food and grocery shopping, and this is a qualitative deficiency which should ideally be addressed.
- 6.13 Moreover, town centres and individual grocery stores located within Fenland's OCA retain, collectively, only 61.8 per cent of the convenience expenditure of residents of the OCA, which is a relatively low level of retention. We therefore consider that a valid policy aspiration would be to seek to increase the convenience retention level.

### *Commercial Leisure Sector*

- 6.14 Expenditure on leisure services in the Fenland catchment area is projected to grow by £53.4m in the period up to 2021. On the basis of current spending levels in Fenland's OCA, over 50 per cent of this spending growth (£28.9m) will go to eating and drinking establishments (restaurants, cafés, take-away outlets and pubs/bars). Capturing a sizeable proportion of this growth in expenditure through the provision of a better and more appealing choice of restaurants, cafés and pubs/bars will be particularly vital to the future health of the two main town centres in Fenland (Wisbech and March).
- 6.15 The remainder of the growth in expenditure on leisure services will go to a wide range of activities, with no single activity capturing a significant market share. In our assessment, there appears to be no scope for a casino development in Fenland. However, the catchment area may be viewed more favourably by neighbourhood bingo clubs, as a potential location for additional bingo provision. We note that planning permission has been granted for a six-screen cinema at the Cromwell Retail Park site, which if built, will satisfy the qualitative need for additional cinema provision within Fenland.

### *Summary*

- 6.16 We consider that the indicative floorspace requirements that we have identified in this Update Study provide a very useful starting point for the assessment of individual planning applications. However, the floorspace requirements that we have identified should be treated as indicative guidelines only. It will be necessary to carefully

consider the merits of individual proposals as and when they arise, taking account of factors including the specific operator, likely sales densities, local 'need' factors, the scale of the proposal (in accordance with the requirements of PPS6), and so on.

## Consideration of Development Opportunities

- 6.17 Our updated retail capacity assessment has shown that there is no surplus expenditure capacity for additional comparison or convenience floorspace in the period to 2016. There is thus no need to identify potential development sites to accommodate additional retail floorspace in the short-term.
- 6.18 Indeed, the limited retail capacity in the OCA is a direct result of the significant amount of committed retail floorspace within the study area. In particular, the proposed development of an out-of-centre retail park at Cromwell Road 'claims' the majority of the surplus comparison expenditure in the period up to 2016.
- 6.19 In the period to 2021, however, there is scope for up to 4,650 sq.m (50,000 sq.ft) of additional comparison sector sales floorspace across the OCA, and in the longer-term period to 2026 there is a notional comparison sector requirement for up to 15,900 sq.m (171,000 sq.ft), although as we have emphasised these longer-term needs should be treated with some caution. Nevertheless, there is a positive requirement for additional comparison retail floorspace across the District in the periods to 2021 and 2026, which the Council will need to plan for.
- 6.20 As we concluded in the original FDRS, we consider that most of the identified additional comparison sector floorspace should be directed to Wisbech and March as the catchment area's two principal towns. We have not identified any interest in Whittlesey or Chatteris from comparison retailers, and demand in these centres is likely to be confined to independent operators that serve a predominantly localised catchment.
- 6.21 We have identified two potential long-term development opportunities - one in Wisbech and one in March - which we outline in broad terms below. Further, more in-depth work would be required to establish the likely level of operator interest in these sites, timescales, the potential mix of use, and so on.

### *Potential Opportunities in Wisbech*

- 6.22 Somers Road car park is an edge-of-centre site, located to the south-west of Wisbech town centre, which provides approximately 270 public parking spaces. Adjacent to the car park is the Queen Mary Centre, a Council-owned community centre. We understand that the Council is currently reviewing the future of the community centre. If the community centre is closed, the site could be redeveloped, alongside part (or all) of the adjoining Somers Road car park.
- 6.23 The car park and community centre site is generally flat and of a sufficient size to accommodate retail development. The site is also relatively well-connected to the retail core (which can be accessed via an existing walkway from the car park), and would form a natural extension to the town centre.
- 6.24 Although the site is potentially suitable for some form of retail development, there are various constraints which may restrict the site's development potential in the short-term. In particular, the site is currently unavailable, being in active use as a community centre and public car park, which at the time of our visit to Wisbech town centre appeared to be very well-used. Furthermore, the majority of the site lacks main road frontage, which may dissuade some retail operators. Development of the car park could also potentially reduce the number of parking spaces available in the wider town centre area, although - if carefully designed - a development scheme should be able to make provision for replacement car parking, or even deliver an increase in the number of car parking spaces.



- 6.25 Overall, we consider that this site has some potential for retail redevelopment, and currently offers the main opportunity for a retail scheme in Wisbech town centre. As we explained in the previous FDRS, opportunities for intensification and/or geographic expansion of the town centre are otherwise heavily constrained by the town centre's conservation area status, as well as the presence of listed buildings and the River Nene. Although the Somers Road site is not available for retail development in the short-term, we therefore consider that it could represent a longer-term development opportunity. However, as noted above, further analysis of the site would be required in order to establish the site's development prospects.
- 6.26 In the short-term, the 29 vacant units in Wisbech town centre should be regarded as the first priority for redevelopment/reoccupation, particularly the vacant former Woolworths unit which is substantial (1,000 sq.m gross) and occupies a prominent position adjacent to Market Place.

### *Potential Opportunities in March*

- 6.27 As we noted in Section 3, intensification and expansion of March town centre is constrained by the historic nature of the centre, and by the River Nene which runs through the centre. The area to the south and west of Acre Road, however, may have potential for redevelopment.
- 6.28 The area that we have considered is depicted in Appendix 5 of Volume 2. A significant proportion of the site - which covers approximately 2.6ha (6.4ac) - is used as surface-level car parking, which provides around 260 spaces serving the town centre. The site also contains various retail and industrial premises, a leisure centre and an educational/training facility, some of which appear to be under-used or vacant.
- 6.29 The majority of the site is located immediately to the rear of the primary retail area and the entire site falls within the defined 'Central Commercial Area'. In location terms, a retail development at the site could therefore function as a town centre scheme. Nevertheless, tying the site into the main High Street shopping frontage might be challenging. Punching through the High Street frontage would not be straightforward because of the presence of historic properties. Furthermore, some site assembly would be required, various existing businesses would have to be relocated and as noted above, existing car parking at the site would also have to be replaced either in-situ or elsewhere in the town centre area.
- 6.30 In summary, whilst further work would be required to establish the development potential of the Acre Road site, our initial view is that the site may offer scope for a high-quality scheme in a location close to the town centre core. The scheme would need to be complementary to the historic town centre. In advance of more detailed work, we anticipate potential for around 25,000-40,000 sq.ft (net sales area) of retail space across a range of unit sizes.
- 6.31 In Appendix 6, we provide details of retail-led schemes on the edge of centres in towns that are broadly comparable to March (in terms of their position in the UK retail rankings, or the characteristics of the development site). All of the case study schemes have either been completed or are substantially underway.