Fenland District Council

FENLAND DISTRICT RETAIL STUDY UPDATE
VOLUME 2 – APPENDICES TO MAIN REPORT

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CONTENTS

APPENDIX ONE

Retail and Leisure Capacity Spreadsheets

Spreadsheet 1 - Definition of Zones

Zone	Wards	Local Authority
Zone 1	Clarkson	Fenland
	Hill	Fenland
	Kirkgate	Fenland
	Medworth	Fenland
	Peckover	Fenland
	Staithe	Fenland
	Waterlees	Fenland
Zone 2	March East	Fenland
	March North	Fenland
	March West	Fenland
Zone 3	Bassenhally	Fenland
	Benwick, Coates and Eastrea	Fenland
	Delph	Fenland
	Kingsmoor	Fenland
	Lattersey	Fenland
	St Andrews	Fenland
	St Marys	Fenland
Zone 4	Birch	Fenland
	Doddington	Fenland
	Slade Lode	Fenland
	The Mills	Fenland
	Wenneye	Fenland

Zone	Wards	Local Authority
Zone 5	Ramsey	Huntingdonshire
	Somersham	Huntingdonshire
	Warboys and Bury	Huntingdonshire
Zone 6	Downham Villages	East Cambridgeshire
	Littleport West	East Cambridgeshire
	Manea	Fenland
	Sutton	East Cambridgeshire
	Wimblington	Fenland
Zone 7	Elm and Christchurch	Fenland
	Emneth with Outwell	King's Lynn and West Norfolk
	Mershe Lande	King's Lynn and West Norfolk
	Sutton Bridge	South Holland
	Upwell and Delph	King's Lynn and West Norfolk
	Walpole	King's Lynn and West Norfolk
	Walton	King's Lynn and West Norfolk
Zone 8	Eye and Thorney	Peterborough
	Long Sutton	South Holland
	Parson Drive and Wisbech St Mary	Fenland
	Roman Bank	Fenland
	The Saints	Lincolnshire

Spreadsheet 2 - Population Projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total
Population 2006	21,295	20,740	16,884	12,015	21,161	14,711	25,483	25,628	**157,917**
Population 2009	22,148	21,571	17,560	12,496	21,661	15,278	26,424	26,735	**163,874**
Population 2013	22,574	21,986	17,898	12,737	22,280	15,639	27,586	27,863	**168,563**
Population 2016	23,261	22,655	18,443	13,124	21,609	15,783	28,540	28,934	**172,349**
Population 2021	23,545	22,932	18,668	13,285	21,661	15,640	29,977	30,076	**175,783**
Population 2026	24,374	23,739	19,326	13,752	22,004	16,189	31,475	31,523	**182,382**
Change in population 2009 - 2013									
Numeric change	426	415	338	241	619	361	1,162	1,128	**4,689**
Percentage change	1.9%	1.9%	1.9%	1.9%	2.9%	2.4%	4.4%	4.2%	**2.9%**
Change in population 2013 - 2016									
Numeric change	687	669	545	388	-672	144	954	1,071	**3,785**
Percentage change	3.0%	3.0%	3.0%	3.0%	-3.0%	0.9%	3.5%	3.8%	**2.2%**
Change in population 2016 - 2021									
Numeric change	284	277	225	160	53	-143	1,436	1,142	**3,435**
Percentage change	1.2%	1.2%	1.2%	1.2%	0.2%	-0.9%	5.0%	3.9%	**2.0%**
Change in population 2021 - 2026									
Numeric change	829	807	657	468	342	549	1,498	1,447	**6,598**
Percentage change	3.5%	3.5%	3.5%	3.5%	1.6%	3.5%	5.0%	4.8%	**3.8%**
Change in population 2009 - 2026									
Numeric change	2,227	2,169	1,765	1,256	342	910	5,050	4,788	**18,508**
Percentage change	10.1%	10.1%	10.1%	10.1%	1.6%	6.0%	19.1%	17.9%	**11.3%**

NOTES:
(1) Mid-year 2006 population data was sourced from Pitney Bowes MapInfo and Oxford Economics.
(2) Spreadsheet 1 lists the wards that each zone comprises, and specifies which local authoritiy administrative area each ward is located within. Population multipliers have been calculated for each local authority area and have been applied to the total population within each relevant ward.
(3) The 2006 population was thus 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 (mid-2007). Population multipliers for South Holland and King's Lynn and West Norfolk were derived from ONS 2006-based Sub-National Population Projections (published 12 June 2008).

Spreadsheet 3 - Comparison Goods Expenditure (per capita)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	£	£	£	£	£	£	£	£
2006	2,684	2,782	2,867	2,860	3,478	3,057	2,732	2,866
2009	3,007	3,117	3,212	3,205	3,897	3,425	3,061	3,211
2013	3,230	3,348	3,451	3,442	4,186	3,679	3,288	3,449
2016	3,409	3,533	3,641	3,632	4,417	3,882	3,470	3,640
2021	4,529	4,695	4,838	4,826	5,869	5,159	4,610	4,836
2026	5,577	5,781	5,957	5,943	7,227	6,352	5,677	5,955

NOTES:
(1) Expenditure data derived from Pitney Bowes Mapinfo 2006 per capita annual comparison goods expenditure estimates, which we have obtained through our in-house GIS system.
(2) The 2006 expenditure data has been projected forward to the base year and forecast years using per capita expenditure growth rates of: 4.91% from 2006 to 2008, 1.81% from 2008 to 2016, 5.85% from 2016 to 2021, and 4.25% from 2021 to 2026 (as explained in Table 4.3 of our main report).

All monetary values are held constant at 2006 prices.

Spreadsheet 4 - Total Comparison Goods Expenditure & Expenditure Growth

Year	Zone 1 £m	Zone 2 £m	Zone 3 £m	Zone 4 £m	Zone 5 £m	Zone 6 £m	Zone 7 £m	Zone 8 £m	All Zones Total £m
Total 2009 (including SFT)	66.61	67.24	56.41	40.04	84.41	52.33	80.89	85.85	**533.79**
Deduction for SFT in 2009 of 12.2%	8.13	8.20	6.88	4.89	10.30	6.38	9.87	10.47	**65.12**
Total 2009 (excluding SFT)	**58.48**	**59.04**	**49.53**	**35.16**	**74.12**	**45.95**	**71.02**	**75.38**	**468.67**
Total 2013 (including SFT)	72.92	73.62	61.76	43.84	93.27	57.54	90.71	96.11	**589.78**
Deduction for SFT in 2013 of 13.9%	10.14	10.23	8.58	6.09	12.96	8.00	12.61	13.36	**81.98**
Total 2013 (excluding SFT)	**62.79**	**63.38**	**53.18**	**37.75**	**80.30**	**49.54**	**78.10**	**82.75**	**507.80**
Total 2016 (including SFT)	79.29	80.04	67.15	47.67	95.44	61.27	99.02	105.31	**635.19**
Deduction for SFT in 2016 of 13.9%	11.02	11.13	9.33	6.63	13.27	8.52	13.76	14.64	**88.29**
Total 2016 (excluding SFT)	**68.27**	**68.91**	**57.82**	**41.04**	**82.18**	**52.75**	**85.26**	**90.67**	**546.90**
Total 2021 (including SFT)	106.64	107.65	90.32	64.11	127.13	80.68	138.20	145.46	**860.20**
Deduction for SFT in 2021 of 13.9%	14.82	14.96	12.55	8.91	17.67	11.21	19.21	20.22	**119.57**
Total 2021 (excluding SFT)	**91.82**	**92.69**	**77.76**	**55.20**	**109.46**	**69.47**	**118.99**	**125.24**	**740.63**
Total 2026 (including SFT)	135.94	137.23	115.13	81.73	159.02	102.83	178.67	187.73	**1098.27**
Deduction for SFT in 2026 of 13.9%	18.90	19.07	16.00	11.36	22.10	14.29	24.84	26.09	**152.66**
Total 2026 (excluding SFT)	**117.04**	**118.15**	**99.12**	**70.37**	**136.91**	**88.54**	**153.84**	**161.63**	**945.61**
Growth in total expenditure 2009 - 2013	4.31	4.35	3.65	2.59	6.19	3.60	7.08	7.37	**39.13**
Growth in total expenditure 2013 - 2016	5.48	5.53	4.64	3.29	1.87	3.21	7.16	7.92	**39.10**
Growth in total expenditure 2016 - 2021	23.55	23.78	19.95	14.16	27.28	16.71	33.73	34.57	**193.73**
Growth in total expenditure 2021 - 2026	25.22	25.46	21.36	15.16	27.45	19.07	34.85	36.39	**204.98**
Growth 2009 - 2026	**58.56**	**59.12**	**49.60**	**35.21**	**62.80**	**42.59**	**82.82**	**86.25**	**476.94**

NOTES:
(1) The figures in the above table are the products of multiplying the data presented in Spreadsheet 2 (population) by Spreadsheet 3 (per capita comparison goods expenditure), and are in millions of pounds (£m).
(2) We have made a deduction for Special Forms of Trading (SFT) (i.e. mail order, TV and internet shopping) from the total expenditure in each zone, using the projections provided by Experian in its Retail Planner Briefing Note 6.1 (Table 5.1). Therefore, we allow a deduction for SFT of 12.2% at 2009 which increases to 13.9% in 2013, and remains at 13.9% in 2016, 2021 and 2026.

All monetary values are held constant at 2006 prices.

Spreadsheet 5 - Comparison Goods Spending Patterns in 2009 as a Percentage Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	%	%	%	%	%	%	%	%
Inside Catchment Area								
Zone 1								
Wisbech	50.5%	9.0%	3.0%	3.5%	0.0%	2.4%	29.9%	19.7%
Other zone 1	5.7%	1.2%	0.9%	0.3%	0.0%	0.2%	3.7%	2.0%
Zone 2								
March	0.1%	30.4%	4.4%	6.6%	0.7%	6.4%	2.0%	0.8%
Other zone 2	0.1%	2.7%	1.0%	0.9%	0.0%	0.1%	0.0%	0.3%
Zone 3								
Whittlesey	0.2%	0.0%	6.5%	0.3%	0.8%	0.0%	0.0%	0.2%
Zone 4								
Chatteris	0.0%	0.0%	0.6%	9.9%	0.0%	0.1%	0.0%	0.0%
Zone 5								
Ramsey	0.0%	0.0%	0.0%	0.0%	8.9%	0.0%	0.0%	0.0%
Other zone 5	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%
Zone 6								
Zone 6 stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 7								
Sutton Bridge	0.3%	0.0%	0.0%	0.0%	0.2%	0.0%	1.1%	0.8%
Zone 8								
Zone 8 stores	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	2.8%
Total Inside Catchment Area	**56.9%**	**43.3%**	**16.4%**	**21.4%**	**10.7%**	**9.1%**	**37.6%**	**26.7%**
Outside Catchment Area								
Cambridge	0.7%	3.5%	2.6%	7.9%	3.7%	34.7%	1.4%	0.1%
Ely	0.0%	0.8%	0.0%	11.0%	0.0%	33.3%	0.0%	0.0%
Huntingdon	0.0%	1.0%	1.3%	8.7%	19.8%	0.2%	0.0%	0.1%
King's Lynn	21.9%	2.7%	2.0%	3.6%	0.0%	3.1%	37.1%	24.5%
Peterborough	16.6%	45.5%	60.6%	37.7%	47.3%	9.0%	12.8%	32.4%
Spalding	0.2%	0.2%	0.3%	0.0%	0.0%	0.0%	0.7%	8.5%
Other outside catchment	3.7%	2.9%	16.8%	9.6%	18.5%	10.6%	10.4%	7.7%
Total Outside Catchment Area	**43.1%**	**56.7%**	**83.6%**	**78.6%**	**89.3%**	**90.9%**	**62.4%**	**73.3%**
OVERALL TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

NOTES:
(1) Spending patterns in the comparison goods sector are derived from the telephone survey of households undertaken by NEMS between April and May 2006 (to feed into the Fenland District Retail Study, 2006). Since there has been little retail development either within or around the study area since 2006, we do not expect that the shopping patterns established by the household survey have changed materially since the survey date.

Spreadsheet 6 - Comparison Goods Spending Patterns in 2009 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total (1)	All Zones Market Share (2)
	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside Catchment Area										
Zone 1										
Wisbech	29.51	5.32	1.48	1.23	0.00	1.10	21.21	14.85	74.71	15.9%
Other zone 1	3.33	0.72	0.46	0.09	0.00	0.11	2.66	1.50	8.87	1.9%
Zone 2										
March	0.05	17.94	2.18	2.30	0.51	2.94	1.42	0.64	27.99	6.0%
Other zone 2	0.07	1.59	0.48	0.32	0.00	0.03	0.00	0.24	2.73	0.6%
Zone 3										
Whittlesey	0.13	0.00	3.23	0.11	0.62	0.00	0.00	0.19	4.28	0.9%
Zone 4										
Chatteris	0.00	0.00	0.29	3.48	0.00	0.03	0.00	0.00	3.79	0.8%
Zone 5										
Ramsey	0.00	0.00	0.00	0.00	6.59	0.00	0.00	0.00	6.59	1.4%
Other zone 5	0.00	0.00	0.00	0.00	0.07	0.00	0.00	0.00	0.07	0.0%
Zone 6										
Zone 6 stores	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Zone 7										
Sutton Bridge	0.15	0.00	0.00	0.00	0.16	0.00	0.77	0.64	1.71	0.4%
Zone 8										
Zone 8 stores	0.00	0.00	0.00	0.00	0.00	0.00	0.64	2.11	2.75	0.6%
Total Inside Catchment Area	**33.25**	**25.57**	**8.13**	**7.54**	**7.95**	**4.20**	**26.69**	**20.16**	**133.49**	**28.5%**
Outside Catchment Area										
Cambridge	0.43	2.05	1.28	2.78	2.75	15.94	0.99	0.04	26.27	5.6%
Ely	0.00	0.50	0.00	3.86	0.00	15.31	0.00	0.00	19.67	4.2%
Huntingdon	0.00	0.60	0.65	3.07	14.66	0.07	0.00	0.04	19.09	4.1%
King's Lynn	12.83	1.58	0.98	1.26	0.02	1.43	26.36	18.47	62.93	13.4%
Peterborough	9.72	26.89	30.02	13.26	35.05	4.14	9.07	24.43	152.58	32.6%
Spalding	0.11	0.14	0.14	0.00	0.00	0.00	0.49	6.44	7.31	1.6%
Other outside catchment	2.15	1.70	8.34	3.39	13.68	4.86	7.42	5.80	47.33	10.1%
Total Outside Catchment Area	**25.23**	**33.46**	**41.40**	**27.62**	**66.17**	**41.75**	**44.33**	**55.22**	**335.18**	**71.5%**
OVERALL TOTAL	**58.48**	**59.04**	**49.53**	**35.16**	**74.12**	**45.95**	**71.02**	**75.38**	**468.67**	**100.0%**

NOTES:
(1) The spending patterns are calculated by multiplying the total comparison goods expenditure in 2009 (Spreadsheet 4) by the market share (Spreadsheet 5). The figures in the 'Total' column are the sum of the expenditure attracted to each centre/store from each zone.
(2) The 'All zones market share' is calculated through dividing the total expenditure retained by each centre by the total expenditure in the study area.

All monetary values are held constant at 2006 prices.

Spreadsheet 7a - Summary of Capacity for Comparison Goods: Scenario A (Declining Retention Rate: from 28.5% to 25.0%)

	2009	2013	2016	2021	2026	2009-13 Change	2013-16 Change	2016-21 Change	2021-26 Change	2009-16 Change	2009-21 Change	2009-26 Change
Study area expenditure retention [(1)]												
A. Total study area expenditure (£m) Exc SFT	468.7	507.8	546.9	740.6	945.6	39.1	39.1	193.7	205.0	78.2	272.0	476.9
B. Current retention level of centres within the study area (%)	*28.5%*	*28.0%*	*27.0%*	*26.0%*	*25.0%*							
C. Retained expenditure (£m) (=A*B)	133.5	142.2	147.7	192.6	236.4	8.7	5.5	44.9	43.8	14.2	59.1	102.9
Turnover of stores [(2)]												
D. Centres' turnover derived from study area (£m)	133.5	137.2	140.0	156.1	168.9							
E. Improvement in sales densities of centres (£m)						3.7	2.8	16.1	12.9	6.5	22.6	35.4
Commitments [(3)]												
Erection of two retail units, High Street, March		0.8	0.8	0.9	1.0							
Erection of retail unit, Station Road, March		2.2	2.3	2.5	2.8							
Change of use to retail warehouse, Sandyland, Wisbech		0.7	0.7	0.8	0.8							
Erection of retail unit, Wisbech Road, March	8.1	8.3	8.5	9.4	10.2							
Erection of three retail warehouse units, Wisbech Road, March		4.5	4.6	5.1	5.5							
Cromwell Road Retail Park, Wisbech		33.2	33.9	37.8	40.9							
Extension to Tesco store, Sandown Road, Wisbech		2.7	2.8	3.1	3.3							
Redevelopment of Tesco store, Hostmoor Avenue, March	4.7	4.8	4.9	5.4	5.9							
Change of use to retail warehouse, EMG Ford Ltd, Cromwell Road, Wisbech	1.3	1.4	1.4	1.6	1.7							
F. Turnover from commitments (£m)		58.5	59.7	66.6	72.1	58.5	1.2	6.9	5.5	59.7	66.6	72.1
G. Residual expenditure (£m) [(4)] **(=C-D-F)**	0.0	-53.5	-52.0	-30.1	-4.6	-53.5	1.5	21.9	25.5	-52.0	-30.1	-4.6
Comparison assessment [(5)]												
Assumed sales density (£/sq.m)	4,000	4,110	4,194	4,676	5,062							
H. Floorspace requirement (net sq.m)	0	-13,014	-12,403	-6,430	-908	-13,014	611	5,973	5,522	-12,403	-6,430	-908
I. Floorspace requirement (gross sq.m)	0	-18,592	-17,718	-9,186	-1,298	-18,592	873	8,532	7,888	-17,718	-9,186	-1,298

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of the study area centres (i.e. the cumulative market share of all the centres within the study area) and the total study area expenditure. In Scenario A, the market share decreases across the forecast years, from 28.5% in 2009 to 25.0% in 2026.
(2) Turnover of stores - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by 0.68% per annum between 2008 and 2016, 2.2% per annum between 2016 and 2021, and 1.6% per annum between 2021 and 2026, to account for sales density growth (which is also included as a separate row).
(3) Commitments - this is the turnover of commitments for new comparison retail floorspace in the study area, which are also assumed to increase by 0.68% per annum between 2008 and 2016, 2.2% per annum between 2016 and 2021, and 1.6% per annum between 2021 and 2026 to account for sales density growth.
(4) Residual expenditure - the total available retained expenditure minus deductions for the existing centres turnover and commitments.
(5) Comparison assessment - this is the conversion of the residual expenditure into a floorspace requirement using a sales density estimate of £4,000/sq.m in 2009, which is forecast to increase at a rate of 0.68% per annum between 2008 and 2016, 2.2% per annum between 2016 and 2021, and 1.6% per annum between 2021 and 2026. A 70% gross to net ratio is assumed.

All monetary values are held constant at 2006 prices.

Spreadsheet 7b - Summary of Capacity for Comparison Goods: Scenario B (Static Retention Rate: 28.5%)

	2009	2013	2016	2021	2026	2009-13 Change	2013-16 Change	2016-21 Change	2021-26 Change	2009-16 Change	2009-21 Change	2009-26 Change
Study area expenditure retention [(1)]												
A. Total study area expenditure (£m) Exc SFT	468.7	507.8	546.9	740.6	945.6	39.1	39.1	193.7	205.0	78.2	272.0	476.9
B. Current retention level of centres within the study area (%)	*28.5%*	*28.5%*	*28.5%*	*28.5%*	*28.5%*							
C. Retained expenditure (£m) (=A*B)	133.5	144.6	155.8	211.0	269.3	11.1	11.1	55.2	58.4	22.3	77.5	135.8
Turnover of stores [(2)]												
D. Centres' turnover derived from study area (£m)	133.5	137.2	140.0	156.1	168.9							
E. Improvement in sales densities of centres (£m)						3.7	2.8	16.1	12.9	6.5	22.6	35.4
Commitments [(3)]												
Erection of two retail units, High Street, March		0.8	0.8	0.9	1.0							
Erection of retail unit, Station Road, March		2.2	2.3	2.5	2.8							
Change of use to retail warehouse, Sandyland, Wisbech		0.7	0.7	0.8	0.8							
Erection of retail unit, Wisbech Road, March	8.1	8.3	8.5	9.4	10.2							
Erection of three retail warehouse units, Wisbech Road, March		4.5	4.6	5.1	5.5							
Cromwell Road Retail Park, Wisbech		33.2	33.9	37.8	40.9							
Extension to Tesco store, Sandown Road, Wisbech		2.7	2.8	3.1	3.3							
Redevelopment of Tesco store, Hostmoor Avenue, March	4.7	4.8	4.9	5.4	5.9							
Change of use to retail warehouse, EMG Ford Ltd, Cromwell Road, Wisbech	1.3	1.4	1.4	1.6	1.7							
F. Turnover from commitments (£m)		58.5	59.7	66.6	72.1	58.5	1.2	6.9	5.5	59.7	66.6	72.1
G. Residual expenditure (£m) [(4)] **(=C-D-F)**	0.0	-51.0	-43.9	-11.7	28.3	-51.0	7.1	32.2	40.0	-43.9	-11.7	28.3
Comparison assessment [(5)]												
Assumed sales density (£/sq.m)	4,000	4,110	4,194	4,676	5,062							
H. Floorspace requirement (net sq.m)	0	-12,418	-10,469	-2,498	5,598	-12,418	1,948	7,971	8,096	-10,469	-2,498	5,598
I. Floorspace requirement (gross sq.m)	0	-17,739	-14,956	-3,569	7,997	-17,739	2,783	11,388	11,565	-14,956	-3,569	7,997

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of the study area centres (i.e. the cumulative market share of all the centres within the study area) and the total study area expenditure. In Scenario B, the market share remains static at 28.5% for each of the forecast years.
(2) Turnover of stores - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by 0.68% per annum between 2008 and 2016, 2.2% per annum between 2016 and 2021, and 1.6% per annum between 2021 and 2026 to account for sales density growth (which is also included as a separate row).
(3) Commitments - this is the turnover of commitments for new comparison retail floorspace in the study area, which are also assumed to increase by 0.68% per annum between 2008 and 2016, 2.2% per annum between 2016 and 2021, and 1.6% per annum between 2021 and 2026 to account for sales density growth.
(4) Residual expenditure - the total available retained expenditure minus deductions for the existing centres turnover and commitments.
(5) Comparison assessment - this is the conversion of the residual expenditure into a floorspace requirement using a sales density estimate of £4,000/sq.m in 2009, which is forecast to increase at a rate of 0.68% per annum between 2008 and 2016, 2.2% per annum between 2016 and 2021, and 1.6% per annum between 2021 and 2026. A 70% gross to net ratio is assumed.

All monetary values are held constant at 2006 prices.

Spreadsheet 7c - Summary of Capacity for Comparison Goods: Scenario C (Moderate Increasing Retention Rate: from 28.5% to 31.0%)

	2009	2013	2016	2021	2026	2009-13 Change	2013-16 Change	2016-21 Change	2021-26 Change	2009-16 Change	2009-21 Change	2009-26 Change
Study area expenditure retention (1)												
A. Total study area expenditure (£m) Exc SFT	468.7	507.8	546.9	740.6	945.6	39.1	39.1	193.7	205.0	78.2	272.0	476.9
B. Current retention level of centres within the study area (%)	*28.5%*	*29.0%*	*30.0%*	*30.5%*	*31.0%*							
C. Retained expenditure (£m) (=A*B)	133.5	147.3	164.1	225.9	293.1	13.8	16.8	61.8	67.2	30.6	92.4	159.7
Turnover of stores (2)												
D. Centres' turnover derived from study area (£m)	133.5	137.2	140.0	156.1	168.9							
E. Improvement in sales densities of centres (£m)						3.7	2.8	16.1	12.9	6.5	22.6	35.4
Commitments (3)												
Erection of two retail units, High Street, March		0.8	0.8	0.9	1.0							
Erection of retail unit, Station Road, March		2.2	2.3	2.5	2.8							
Change of use to retail warehouse, Sandyland, Wisbech		0.7	0.7	0.8	0.8							
Erection of retail unit, Wisbech Road, March	8.1	8.3	8.5	9.4	10.2							
Erection of three retail warehouse units, Wisbech Road, March		4.5	4.6	5.1	5.5							
Cromwell Road Retail Park, Wisbech		33.2	33.9	37.8	40.9							
Extension to Tesco store, Sandown Road, Wisbech		2.7	2.8	3.1	3.3							
Redevelopment of Tesco store, Hostmoor Avenue, March	4.7	4.8	4.9	5.4	5.9							
Change of use to retail warehouse, EMG Ford Ltd, Cromwell Road, Wisbech	1.3	1.4	1.4	1.6	1.7							
F. Turnover from commitments (£m)		58.5	59.7	66.6	72.1	58.5	1.2	6.9	5.5	59.7	66.6	72.1
G. Residual expenditure (£m) (4) **(=C-D-F)**	0.0	-48.4	-35.6	3.3	52.1	-48.4	12.8	38.9	48.9	-35.6	3.3	52.1
Comparison assessment (5)												
Assumed sales density (£/sq.m)	4,000	4,110	4,194	4,676	5,062							
H. Floorspace requirement (net sq.m)	0	-11,779	-8,491	697	10,300	-11,779	3,288	9,188	9,603	-8,491	697	10,300
I. Floorspace requirement (gross sq.m)	0	-16,826	-12,130	996	14,714	-16,826	4,697	13,126	13,719	-12,130	996	14,714

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of the study area centres (i.e. the cumulative market share of all the centres within the study area) and the total study area expenditure. In Scenario C, the market share increases moderately across the forecast years, from 28.5% in 2009 to 31.0% in 2026.
(2) Turnover of stores - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by 0.68% per annum between 2008 and 2016, 2.2% per annum between 2016 and 2021, and 1.6% per annum between 2021 and 2026 to account for sales density growth (which is also included as a separate row).
(3) Commitments - this is the turnover of commitments for new comparison retail floorspace in the study area, which are also assumed to increase by 0.68% per annum between 2008 and 2016, 2.2% per annum between 2016 and 2021, and 1.6% per annum between 2021 and 2026 to account for sales density growth.
(4) Residual expenditure - the total available retained expenditure minus deductions for the existing centres turnover and commitments.
(5) Comparison assessment - this is the conversion of the residual expenditure into a floorspace requirement using a sales density estimate of £4,000/sq.m in 2009, which is forecast to increase at a rate of 0.68% per annum between 2008 and 2016, 2.2% per annum between 2016 and 2021, and 1.6% per annum between 2021 and 2026. A 70% gross to net ratio is assumed.

All monetary values are held constant at 2006 prices.

Spreadsheet 7d - Summary of Capacity for Comparison Goods: Scenario D (Significant Increasing Retention Rate: from 28.5% to 34.0%)

	2009	2013	2016	2021	2026	2009-13 Change	2013-16 Change	2016-21 Change	2021-26 Change	2009-16 Change	2009-21 Change	2009-26 Change
Study area expenditure retention [1]												
A. Total study area expenditure (£m) Exc SFT	468.7	507.8	546.9	740.6	945.6	39.1	39.1	193.7	205.0	78.2	272.0	476.9
B. Current retention level of centres within the study area (%)	*28.5%*	*30.0%*	*32.0%*	*33.0%*	*34.0%*							
C. Retained expenditure (£m) (=A*B)	133.5	152.3	175.0	244.4	321.5	18.8	22.7	69.4	77.1	41.5	110.9	188.0
Turnover of stores [2]												
D. Centres' turnover derived from study area (£m)	133.5	137.2	140.0	156.1	168.9							
E. Improvement in sales densities of centres (£m)						3.7	2.8	16.1	12.9	6.5	22.6	35.4
Commitments [3]												
Erection of two retail units, High Street, March		0.8	0.8	0.9	1.0							
Erection of retail unit, Station Road, March		2.2	2.3	2.5	2.8							
Change of use to retail warehouse, Sandyland, Wisbech		0.7	0.7	0.8	0.8							
Erection of retail unit, Wisbech Road, March	8.1	8.3	8.5	9.4	10.2							
Erection of three retail warehouse units, Wisbech Road, March		4.5	4.6	5.1	5.5							
Cromwell Road Retail Park, Wisbech		33.2	33.9	37.8	40.9							
Extension to Tesco store, Sandown Road, Wisbech		2.7	2.8	3.1	3.3							
Redevelopment of Tesco store, Hostmoor Avenue, March	4.7	4.8	4.9	5.4	5.9							
Change of use to retail warehouse, EMG Ford Ltd, Cromwell Road, Wisbech	1.3	1.4	1.4	1.6	1.7							
F. Turnover from commitments (£m)		58.5	59.7	66.6	72.1	58.5	1.2	6.9	5.5	59.7	66.6	72.1
G. Residual expenditure (£m) [4] **(=C-D-F)**	0.0	-43.3	-24.7	21.8	80.5	-43.3	18.7	46.4	58.7	-24.7	21.8	80.5
Comparison assessment [5]												
Assumed sales density (£/sq.m)	4,000	4,110	4,194	4,676	5,062							
H. Floorspace requirement (net sq.m)	0	-10,543	-5,883	4,657	15,904	-10,543	4,660	10,540	11,248	-5,883	4,657	15,904
I. Floorspace requirement (gross sq.m)	0	-15,061	-8,404	6,653	22,721	-15,061	6,657	15,057	16,068	-8,404	6,653	22,721

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of the study area centres (i.e. the cumulative market share of all the centres within the study area) and the total study area expenditure. In Scenario D, the market share increases significantly across the forecast years, from 28.5% in 2009 to 34.0% in 2026.
(2) Turnover of stores - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by 0.68% per annum between 2008 and 2016, 2.2% per annum between 2016 and 2021, and 1.6% per annum between 2021 and 2026 to account for sales density growth (which is also included as a separate row).
(3) Commitments - this is the turnover of commitments for new comparison retail floorspace in the study area, which are also assumed to increase by 0.68% per annum between 2008 and 2016, 2.2% per annum between 2016 and 2021, and 1.6% per annum between 2021 and 2026 to account for sales density growth.
(4) Residual expenditure - the total available retained expenditure minus deductions for the existing centres turnover and commitments.
(5) Comparison assessment - this is the conversion of the residual expenditure into a floorspace requirement using a sales density estimate of £4,000/sq.m in 2009, which is forecast to increase at a rate of 0.68% per annum between 2008 and 2016, 2.2% per annum between 2016 and 2021, and 1.6% per annum between 2021 and 2026. A 70% gross to net ratio is assumed.

All monetary values are held constant at 2006 prices.

Spreadsheet 8 - Definition of Zones

Zone	Wards	Local Authority
Zone 1	Clarkson	Fenland
	Hill	Fenland
	Kirkgate	Fenland
	Medworth	Fenland
	Peckover	Fenland
	Staithe	Fenland
	Waterlees	Fenland
Zone 2	March East	Fenland
	March North	Fenland
	March West	Fenland
Zone 3	Bassenhally	Fenland
	Benwick, Coates and Eastrea	Fenland
	Delph	Fenland
	Kingsmoor	Fenland
	Lattersey	Fenland
	St Andrews	Fenland
	St Marys	Fenland
Zone 4	Birch	Fenland
	Doddington	Fenland
	Slade Lode	Fenland
	The Mills	Fenland
	Wenneye	Fenland

Zone	Wards	Local Authority
Zone 5	Ramsey	Huntingdonshire
	Somersham	Huntingdonshire
	Warboys and Bury	Huntingdonshire
Zone 6	Downham Villages	East Cambridgeshire
	Littleport West	East Cambridgeshire
	Manea	Fenland
	Sutton	East Cambridgeshire
	Wimblington	Fenland
Zone 7	Elm and Christchurch	Fenland
	Emneth with Outwell	King's Lynn and West Norfolk
	Mershe Lande	King's Lynn and West Norfolk
	Sutton Bridge	South Holland
	Upwell and Delph	King's Lynn and West Norfolk
	Walpole	King's Lynn and West Norfolk
	Walton	King's Lynn and West Norfolk
Zone 8	Eye and Thorney	Peterborough
	Long Sutton	South Holland
	Parson Drive and Wisbech St Mary	Fenland
	Roman Bank	Fenland
	The Saints	Lincolnshire

Spreadsheet 9 - Population Projections

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total
Population 2006	21,295	20,740	16,884	12,015	21,161	14,711	25,483	25,628	**157,917**
Population 2009	22,148	21,571	17,560	12,496	21,661	15,278	26,424	26,735	**163,874**
Population 2013	22,574	21,986	17,898	12,737	22,280	15,639	27,586	27,863	**168,563**
Population 2016	23,261	22,655	18,443	13,124	21,609	15,783	28,540	28,934	**172,349**
Population 2021	23,545	22,932	18,668	13,285	21,661	15,640	29,977	30,076	**175,783**
Population 2026	24,374	23,739	19,326	13,752	22,004	16,189	31,475	31,523	**182,382**
Change in population 2009 - 2013									
Numeric change	426	415	338	241	619	361	1,162	1,128	**4,689**
Percentage change	1.9%	1.9%	1.9%	1.9%	2.9%	2.4%	4.4%	4.2%	**2.9%**
Change in population 2013 - 2016									
Numeric change	687	669	545	388	-672	144	954	1,071	**3,785**
Percentage change	3.0%	3.0%	3.0%	3.0%	-3.0%	0.9%	3.5%	3.8%	**2.2%**
Change in population 2016 - 2021									
Numeric change	284	277	225	160	53	-143	1,436	1,142	**3,435**
Percentage change	1.2%	1.2%	1.2%	1.2%	0.2%	-0.9%	5.0%	3.9%	**2.0%**
Change in population 2021 - 2026									
Numeric change	829	807	657	468	342	549	1,498	1,447	**6,598**
Percentage change	3.5%	3.5%	3.5%	3.5%	1.6%	3.5%	5.0%	4.8%	**3.8%**
Change in population 2009 - 2026									
Numeric change	2,227	2,169	1,765	1,256	342	910	5,050	4,788	**18,508**
Percentage change	10.1%	10.1%	10.1%	10.1%	1.6%	6.0%	19.1%	17.9%	**11.3%**

NOTES:
(1) Mid-year 2006 population data was sourced from Pitney Bowes MapInfo and Oxford Economics.
(2) Spreadsheet 8 lists the wards that each zone comprises, and specifies which local authoritiy administrative area each ward is located within. Population multipliers have been calculated for each local authority area and have been applied to the total population within each relevant ward.
(3) The 2006 population was thus 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 (mid-2007). Population multipliers for South Holland and King's Lynn and West Norfolk were derived from ONS 2006-based Sub-National Population Projections (published 12 June 2008).

Spreadsheet 10 - Convenience Goods Expenditure (per capita)

Year	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	£	£	£	£	£	£	£	£
2006	1,458	1,490	1,502	1,510	1,730	1,564	1,486	1,582
2009	1,526	1,560	1,572	1,581	1,811	1,637	1,556	1,656
2013	1,540	1,574	1,587	1,595	1,828	1,652	1,570	1,671
2016	1,551	1,585	1,598	1,606	1,840	1,664	1,581	1,683
2021	1,618	1,654	1,667	1,676	1,920	1,736	1,649	1,756
2026	1,655	1,691	1,705	1,714	1,964	1,775	1,687	1,796

NOTES:
(1) Expenditure data derived from Pitney Bowes Mapinfo 2006 per capita annual convenience goods expenditure estimates, which we have obtained through our in-house GIS system.
(2) The 2006 expenditure data has been projected forward to the base year and forecast years using per capita expenditure growth rates of: 2.20% from 2006 to 2008, 0.23% from 2008 to 2016 , 0.85% from 2016 to 2021, and 0.45% from 2021 to 2026 (as explained in Table 4.3 of our main report).

All monetary values are held constant at 2006 prices.

Spreadsheet 11 - Total Convenience Goods Expenditure & Expenditure Growth

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	All Zones Total
Year	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total 2009 (including SFT)	33.81	33.65	27.61	19.75	39.23	25.02	41.11	44.28	**264.45**
Deduction for SFT in 2009 of 3.25%	1.10	1.09	0.90	0.64	1.28	0.81	1.34	1.44	**8.59**
Total 2009 (excluding SFT)	**32.71**	**32.55**	**26.71**	**19.11**	**37.96**	**24.20**	**39.77**	**42.84**	**255.86**
Total 2013 (including SFT)	34.77	34.61	28.40	20.32	40.72	25.84	43.31	46.57	**274.56**
Deduction for SFT in 2013 of 3.9%	1.36	1.35	1.11	0.79	1.59	1.01	1.69	1.82	**10.71**
Total 2013 (excluding SFT)	**33.42**	**33.26**	**27.30**	**19.53**	**39.14**	**24.83**	**41.62**	**44.76**	**263.85**
Total 2016 (including SFT)	36.08	35.91	29.47	21.08	39.77	26.26	45.12	48.70	**282.39**
Deduction for SFT in 2016 of 4.05%	1.46	1.45	1.19	0.85	1.61	1.06	1.83	1.97	**11.44**
Total 2016 (excluding SFT)	**34.62**	**34.46**	**28.28**	**20.23**	**38.16**	**25.20**	**43.29**	**46.72**	**270.95**
Total 2021 (including SFT)	38.10	37.92	31.12	22.26	41.59	27.15	49.44	52.81	**300.39**
Deduction for SFT in 2021 of 4.05%	1.54	1.54	1.26	0.90	1.68	1.10	2.00	2.14	**12.17**
Total 2021 (excluding SFT)	**36.56**	**36.39**	**29.86**	**21.36**	**39.91**	**26.05**	**47.44**	**50.67**	**288.22**
Total 2026 (including SFT)	40.34	40.15	32.95	23.57	43.21	28.74	53.09	56.60	**318.64**
Deduction for SFT in 2026 of 4.05%	1.63	1.63	1.33	0.95	1.75	1.16	2.15	2.29	**12.90**
Total 2026 (excluding SFT)	**38.70**	**38.52**	**31.61**	**22.62**	**41.46**	**27.57**	**50.94**	**54.31**	**305.73**
Growth in total expenditure 2009 - 2013	0.71	0.71	0.58	0.42	1.18	0.63	1.85	1.92	**8.00**
Growth in total expenditure 2013 - 2016	1.20	1.20	0.98	0.70	-0.98	0.36	1.67	1.97	**7.10**
Growth in total expenditure 2016 - 2021	1.94	1.93	1.58	1.13	1.75	0.85	4.14	3.94	**17.27**
Growth in total expenditure 2021 - 2026	2.15	2.14	1.75	1.25	1.55	1.53	3.50	3.64	**17.51**
Growth 2009 - 2026	**6.00**	**5.97**	**4.90**	**3.50**	**3.50**	**3.37**	**11.17**	**11.47**	**49.88**

NOTES:
(1) The figures in the above table are the products of multiplying the data presented in Spreadsheet 9 (population) by Spreadsheet 10 (per capita convenience goods expenditure), and are in millions of pounds (£m).
(2) We have deducted a percentage of expenditure for Special Forms of Trading (SFT) (i.e. outdoor markets and Internet shopping) from the total expenditure, and we anticipate that this percentage will increase year on year. Therefore we allow a deduction for SFT of 3.25% at 2009, which increases to 3.9% in 2013, to 4.05% in 2016 and remains at 4.05% in 2021 and 2026.

All monetary values are held constant at 2006 prices.

Spreadsheet 12 - Convenience Goods Spending Patterns in 2009 as a Percentage Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8
	%	%	%	%	%	%	%	%
Inside Catchment Area								
Zone 1								
Asda, North End, Wisbech	20.45%	1.73%	0.59%	2.66%	0.00%	0.75%	16.52%	15.80%
Somerfield, Horse Fair, Wisbech	21.32%	0.00%	2.83%	0.00%	0.00%	0.00%	2.13%	1.20%
Tesco Superstore, Sandown Road, Wisbech	41.96%	0.60%	0.89%	0.00%	0.00%	0.75%	29.01%	16.11%
Other Wisbech	10.21%	0.00%	0.00%	0.00%	0.00%	0.00%	6.07%	2.84%
Zone 2								
Sainsburys, Mill View, March	0.00%	33.92%	1.73%	4.26%	0.79%	2.73%	1.17%	0.00%
Somerfield, High Street, March	0.00%	7.97%	0.00%	0.00%	0.00%	0.00%	0.54%	0.00%
Tesco Superstore, March Industrial Estate, March	0.30%	44.50%	10.88%	18.38%	0.27%	12.52%	1.16%	0.88%
Other March	0.00%	7.14%	0.30%	1.92%	0.00%	2.70%	0.00%	0.00%
Zone 3								
Somerfield, Blunts Lane, Peterborough	0.00%	0.00%	26.52%	0.00%	0.00%	0.00%	0.00%	0.34%
Other zone 3	0.00%	0.00%	2.79%	0.00%	0.00%	0.75%	0.00%	0.00%
Zone 4								
Co-Op, Market Town Store, Bridge Street, Chatteris	0.00%	0.00%	0.89%	16.31%	0.52%	0.75%	0.00%	0.00%
Somerfield, High Street, Chatteris	0.00%	0.00%	0.00%	30.11%	0.00%	0.00%	0.00%	0.00%
Other Chatteris	0.00%	0.00%	0.00%	5.16%	0.00%	0.00%	0.00%	0.00%
Zone 5								
Co-Op, Rainbow Store, Newtown Road, Huntingdon	0.58%	0.00%	0.30%	0.00%	27.43%	0.00%	0.00%	1.16%
Somerfield, Great Whyte, Huntingdon	0.00%	0.00%	0.30%	0.00%	14.34%	0.00%	0.00%	0.00%
Other zone 5	0.00%	0.00%	0.00%	0.00%	4.43%	0.00%	0.00%	0.00%
Zone 6								
Zone 6 stores	0.00%	0.00%	0.30%	0.00%	0.00%	6.40%	0.00%	0.00%
Zone 7								
Zone 7 stores	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	4.13%	0.00%
Zone 8								
Zone 8 stores	0.00%	0.00%	0.63%	0.00%	0.00%	0.00%	0.00%	5.87%
Total Inside Catchment Area	**94.82%**	**95.86%**	**48.94%**	**78.81%**	**47.78%**	**27.33%**	**60.73%**	**44.20%**
Outside Catchment	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Asda, Viersen Platz, Peterborough	0.00%	0.00%	5.56%	0.00%	2.14%	0.00%	0.00%	1.16%
Co-Op, Food Shop, West Street, Spalding	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.83%	18.55%
Kwik Save, High Causeway, Peterborough	0.00%	0.00%	5.78%	0.00%	0.52%	0.00%	0.00%	0.00%
Morrisons, Wardentree Lane, Spalding	0.58%	0.00%	0.00%	0.00%	0.52%	0.00%	1.16%	5.80%
Sainsburys, Oxney Road, Peterborough	0.58%	0.00%	5.91%	0.00%	0.00%	0.00%	0.00%	6.80%
Tesco Express, Wertheim Way, Huntingdon	0.00%	0.00%	0.30%	2.94%	6.83%	0.49%	0.86%	0.00%
Tesco Extra, The Serpentine, Peterborough	0.00%	0.60%	21.07%	0.74%	4.63%	0.00%	0.00%	2.66%
Tesco Superstore, Abbots Ripton Road, Huntingdon	0.00%	0.00%	1.10%	3.75%	18.75%	0.00%	0.00%	0.00%
Tesco Superstore, Angel Drove, Ely	0.00%	0.00%	0.00%	7.43%	0.00%	19.55%	0.00%	0.00%
Tesco, Boston Road South, Spalding	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	3.71%	5.83%
Tesco, Market Place, Ely	0.00%	0.60%	0.00%	2.21%	0.00%	31.39%	0.00%	0.00%
Waitrose, Brays Lane, Ely	0.00%	0.00%	0.00%	0.74%	0.00%	5.46%	0.54%	0.00%
Other, Peterborough	0.30%	1.20%	7.59%	0.74%	2.34%	0.00%	0.86%	9.14%
Other, Kings Lynn	2.54%	1.13%	0.59%	0.00%	0.00%	0.00%	13.23%	3.74%
Other, Outside Catchment Area	1.18%	0.60%	3.17%	2.66%	16.49%	15.79%	15.08%	2.11%
Total Outside Catchment Area	**5.18%**	**4.14%**	**51.06%**	**21.19%**	**52.22%**	**72.67%**	**39.27%**	**55.80%**
OVERALL TOTAL	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**	**100.00%**

NOTES:
(1) Spending patterns in the convenience goods sector are derived from the telephone survey of households undertaken by NEMS between April and May 2006 (to feed into the Fenland District Retail Study, 2006). Since there has been little retail development either within or around the study area since 2006, we do not expect that the shopping patterns established by the household survey have changed materially since the survey date.

Spreadsheet 13 - Convenience Goods Spending Patterns in 2009 Across the Study Area Zones

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Total (1)	All Zones Market Share (2)
	£m	£m	£m	£m	£m	£m	£m	£m	£m	%
Inside Catchment Area										
Zone 1										
Asda, North End, Wisbech	6.69	0.56	0.16	0.51	0.00	0.18	6.57	6.77	21.44	8.4%
Somerfield, Horse Fair, Wisbech	6.97	0.00	0.76	0.00	0.00	0.00	0.85	0.51	9.09	3.6%
Tesco Superstore, Sandown Road, Wisbech	13.72	0.20	0.24	0.00	0.00	0.18	11.54	6.90	32.78	12.8%
Other Wisbech	3.34	0.00	0.00	0.00	0.00	0.00	2.41	1.22	6.97	2.7%
Zone 2										
Sainsburys, Mill View, March	0.00	11.04	0.46	0.81	0.30	0.66	0.47	0.00	13.74	5.4%
Somerfield, High Street, March	0.00	2.60	0.00	0.00	0.00	0.00	0.21	0.00	2.81	1.1%
Tesco Superstore, March Industrial Estate, March	0.10	14.49	2.91	3.51	0.10	3.03	0.46	0.38	24.98	9.8%
Other March	0.00	2.32	0.08	0.37	0.00	0.65	0.00	0.00	3.42	1.3%
Zone 3										
Somerfield, Blunts Lane, Peterborough	0.00	0.00	7.08	0.00	0.00	0.00	0.00	0.15	7.23	2.8%
Other zone 3	0.00	0.00	0.74	0.00	0.00	0.18	0.00	0.00	0.93	0.4%
Zone 4										
Co-Op, Market Town Store, Bridge Street, Chatteris	0.00	0.00	0.24	3.12	0.20	0.18	0.00	0.00	3.73	1.5%
Somerfield, High Street, Chatteris	0.00	0.00	0.00	5.76	0.00	0.00	0.00	0.00	5.76	2.2%
Other Chatteris	0.00	0.00	0.00	0.99	0.00	0.00	0.00	0.00	0.99	0.4%
Zone 5										
Co-Op, Rainbow Store, Newtown Road, Huntingdon	0.19	0.00	0.08	0.00	10.41	0.00	0.00	0.50	11.18	4.4%
Somerfield, Great Whyte, Huntingdon	0.00	0.00	0.08	0.00	5.44	0.00	0.00	0.00	5.52	2.2%
Other zone 5	0.00	0.00	0.00	0.00	1.68	0.00	0.00	0.00	1.68	0.7%
Zone 6										
Zone 6 stores	0.00	0.00	0.08	0.00	0.00	1.55	0.00	0.00	1.63	0.6%
Zone 7										
Zone 7 stores	0.00	0.00	0.00	0.00	0.00	0.00	1.64	0.00	1.64	0.6%
Zone 8										
Zone 8 stores	0.00	0.00	0.17	0.00	0.00	0.00	0.00	2.51	2.68	1.0%
Total Inside Catchment Area	**31.01**	**31.21**	**13.07**	**15.06**	**18.13**	**6.61**	**24.15**	**18.94**	**158.20**	**61.8%**
Outside Catchment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.0%
Asda, Viersen Platz, Peterborough	0.00	0.00	1.49	0.00	0.81	0.00	0.00	0.50	2.80	1.1%
Co-Op, Food Shop, West Street, Spalding	0.00	0.00	0.00	0.00	0.00	0.00	1.52	7.95	9.47	3.7%
Kwik Save, High Causeway, Peterborough	0.00	0.00	1.54	0.00	0.20	0.00	0.00	0.00	1.74	0.7%
Morrisons, Wardentree Lane, Spalding	0.19	0.00	0.00	0.00	0.20	0.00	0.46	2.48	3.33	1.3%
Sainsburys, Oxney Road, Peterborough	0.19	0.00	1.58	0.00	0.00	0.00	0.00	2.91	4.68	1.8%
Tesco Express, Wertheim Way, Huntingdon	0.00	0.00	0.08	0.56	2.59	0.12	0.34	0.00	3.69	1.4%
Tesco Extra, The Serpentine, Peterborough	0.00	0.20	5.63	0.14	1.76	0.00	0.00	1.14	8.86	3.5%
Tesco Superstore, Abbots Ripton Road, Huntingdon	0.00	0.00	0.29	0.72	7.12	0.00	0.00	0.00	8.13	3.2%
Tesco Superstore, Angel Drove, Ely	0.00	0.00	0.00	1.42	0.00	4.73	0.00	0.00	6.15	2.4%
Tesco, Boston Road South, Spalding	0.00	0.00	0.00	0.00	0.00	0.00	1.48	2.50	3.98	1.6%
Tesco, Market Place, Ely	0.00	0.20	0.00	0.42	0.00	7.60	0.00	0.00	8.22	3.2%
Waitrose, Brays Lane, Ely	0.00	0.00	0.00	0.14	0.00	1.32	0.21	0.00	1.68	0.7%
Other, Peterborough	0.10	0.39	2.03	0.14	0.89	0.00	0.34	3.92	7.80	3.0%
Other, Kings Lynn	0.83	0.37	0.16	0.00	0.00	0.00	5.26	1.60	8.22	3.2%
Other, Outside Catchment Area	0.38	0.20	0.85	0.51	6.26	3.82	6.00	0.90	18.92	7.4%
Total Outside Catchment Area	**1.69**	**1.35**	**13.64**	**4.05**	**19.82**	**17.59**	**15.62**	**23.90**	**97.66**	**38.2%**
OVERALL TOTAL	**32.71**	**32.55**	**26.71**	**19.11**	**37.96**	**24.20**	**39.77**	**42.84**	**255.86**	**100.0%**

NOTES:
(1) The spending patterns are calculated by multiplying the total convenience goods expenditure in 2009 (Spreadsheet 11) by the market share (Spreadsheet 12). The figures in the 'Total' column are the sum of the expenditure attracted to each centre/store from each zone.
(2) The 'All zones market share' is calculated through dividing the total expenditure attracted by each centre/store by the total expenditure in the study area.

All monetary values are held constant at 2006 prices.

Spreadsheet 14a - Summary of Capacity for Convenience Goods: Scenario A (Static Retention Rate: 61.8%)

	2009	2013	2016	2021	2026	2009-13 Change	2013-16 Change	2016-21 Change	2021-26 Change	2009-16 Change	2009-21 Change	2009-26 Change
Study area expenditure retention (1)												
A. Total study area expenditure (£m) Exc SFT	255.9	263.9	271.0	288.2	305.7	8.0	7.1	17.3	17.5	15.1	32.4	49.9
B. Current retention level of centres within the study area (%)	*61.8%*	*61.8%*	*61.8%*	*61.8%*	*61.8%*							
C. Retained expenditure (£m) (=A*B)	158.2	163.1	167.5	178.2	189.0	4.9	4.4	10.7	10.8	9.3	20.0	30.8
Turnover of stores (2)												
D. Centres' turnover derived from study area (£m)	158.2	159.2	160.0	164.9	167.5							
E. Improvement in sales densities of centres (£m)						1.0	0.8	4.9	2.6	1.8	6.7	9.3
Commitments (3)												
Tesco store, Stocking Fen Road, Ramsey		12.6	12.6	13.0	13.2							
Extension to Tesco store, Sandown Road, Wisbech		4.9	4.9	5.1	5.1							
Lidl store, Cromwell Road, Wisbech	2.4	2.4	2.4	2.5	2.5							
Redevelopment of Tesco store, Hostmoor Avenue, March	15.2	15.3	15.3	15.8	16.1							
F. Turnover from commitments (£m)		35.1	35.3	36.4	37.0	35.1	0.2	1.1	0.6	35.3	36.4	37.0
G. Residual expenditure (£m) (4) **(=C-D-F)**	0.0	-31.2	-27.8	-23.0	-15.4	-31.2	3.4	4.7	7.6	-27.8	-23.0	-15.4
Convenience assessment (5)												
Assumed sales density (£/sq.m)	10,000	10,065	10,114	10,421	10,588							
H. Floorspace requirement (net sq.m)	0	-3,103	-2,747	-2,211	-1,457	-3,103	356	536	754	-2,747	-2,211	-1,457
I. Floorspace requirement (gross sq.m)	0	-4,774	-4,227	-3,402	-2,242	-4,774	547	825	1,159	-4,227	-3,402	-2,242

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of the study area centres/stores (i.e. the cumulative market share of all the centres/stores within the study area) and the total study area expenditure. In Scenario A, the market share remains constant at 61.8% for each of the forecast years.
(2) Turnover of stores - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by 0.16% per annum between 2008 and 2016, 0.60% per annum between 2016 and 2021, and 0.32% per annum between 2021 and 2026 to account for sales density growth (which is also included as a separate row).
(3) Commitments - this is the turnover of commitments for new convenience retail floorspace in the study area, which are also assumed to increase by 0.16% per annum between 2008 and 2016, 0.60% per annum between 2016 and 2021, and 0.32% per annum between 2021 and 2026 to account for sales density growth.
(4) Residual expenditure - the total available retained expenditure minus deductions for the existing centres' turnover and commitments.
(5) Convenience assessment - SUPERMARKETS - the residual expenditure is converted to a supermarket floorspace requirement using a sales density estimate of £10,000/sq.m in 2009, which is forecast to increase by 0.16% per annum between 2008 and 2016, 0.60% per annum between 2016 and 2021, and 0.32% per annum between 2021 and 2026. A 65% net to gross ratio is assumed.

All monetary values are held constant at 2006 prices.

Spreadsheet 14b - Summary of Capacity for Convenience Goods: Scenario B (Increasing Retention Rate: from 61.8% to 70.0%)

	2009	2013	2016	2021	2026	2009-13 Change	2013-16 Change	2016-21 Change	2021-26 Change	2009-16 Change	2009-21 Change	2009-26 Change
Study area expenditure retention [1]												
A. Total study area expenditure (£m) Exc SFT	255.9	263.9	271.0	288.2	305.7	8.0	7.1	17.3	17.5	15.1	32.4	49.9
B. Current retention level of centres within the study area (%)	*61.8%*	*64.0%*	*66.0%*	*68.0%*	*70.0%*							
C. Retained expenditure (£m) (=A*B)	158.2	168.9	178.8	196.0	214.0	10.7	10.0	17.2	18.0	20.6	37.8	55.8
Turnover of stores [2]												
D. Centres' turnover derived from study area (£m)	158.2	159.2	160.0	164.9	167.5							
E. Improvement in sales densities of centres (£m)						1.0	0.8	4.9	2.6	1.8	6.7	9.3
Commitments [3]												
Tesco store, Stocking Fen Road, Ramsey		12.6	12.6	13.0	13.2							
Extension to Tesco store, Sandown Road, Wisbech		4.9	4.9	5.1	5.1							
Lidl store, Cromwell Road, Wisbech	2.4	2.4	2.4	2.5	2.5							
Redevelopment of Tesco store, Hostmoor Avenue, March	15.2	15.3	15.3	15.8	16.1							
F. Turnover from commitments (£m)		35.1	35.3	36.4	37.0	35.1	0.2	1.1	0.6	35.3	36.4	37.0
G. Residual expenditure (£m) [4] **(=C-D-F)**	0.0	-25.5	-16.5	-5.3	9.5	-25.5	9.0	11.2	14.8	-16.5	-5.3	9.5
Convenience assessment [5]												
Assumed sales density (£/sq.m)	10,000	10,065	10,114	10,421	10,588							
H. Floorspace requirement (net sq.m)	0	-2,534	-1,630	-504	902	-2,534	904	1,126	1,406	-1,630	-504	902
I. Floorspace requirement (gross sq.m)	0	-3,898	-2,508	-776	1,388	-3,898	1,390	1,732	2,164	-2,508	-776	1,388

NOTES:
(1) Study area expenditure retention - this is the product of the current market share of the study area centres/stores (i.e. the cumulative market share of all the centres/stores within the study area) and the total study area expenditure. In Scenario B, the market share increases across the forecast years, from 61.8% in 2009 to 70.0% in 2026.
(2) Turnover of stores - this is the turnover of stores that is derived from study area expenditure only. We have forecast this turnover to increase by 0.16% per annum between 2008 and 2016, 0.60% per annum between 2016 and 2021, and 0.32% per annum between 2021 and 2026 to account for sales density growth (which is also included as a separate row).
(3) Commitments - this is the turnover of commitments for new convenience retail floorspace in the study area, which are also assumed to increase by 0.16% per annum between 2008 and 2016, 0.60% per annum between 2016 and 2021, and 0.32% per annum between 2021 and 2026 to account for sales density growth.
(4) Residual expenditure - the total available retained expenditure minus deductions for the existing centres' turnover and commitments.
(5) Convenience assessment - SUPERMARKETS - the residual expenditure is converted to a supermarket floorspace requirement using a sales density estimate of £10,000/sq.m in 2009, which is forecast to increase by 0.16% per annum between 2008 and 2016, 0.60% per annum between 2016 and 2021, and 0.32% per annum between 2021 and 2026. A 65% net to gross ratio is assumed.

All monetary values are held constant at 2006 prices.

Spreadsheet 15 - Fenland Leisure Expenditure Forecasts

ZONE	2006 Popn (Source: MapInfo)	Total Leisure Services Exp Per Person (2006, Source: MapInfo)	Total Leisure Services Exp. (2006)	2009 Population	Total Leisure Services Exp Per Person (2009)	Total Leisure Services Exp (2009)	2013 Population	Total Leisure Services Exp Per Person (2013)	Total Leisure Services Exp (2013)	2016 Population	Total Leisure Services Exp Per Person (2016)	Total Leisure Services Exp (2016)	2021 Population	Total Leisure Services Exp Per Person (2021)	Total Leisure Services Exp (2021)	2026 Population	Total Leisure Services Exp Per Person (2026)	Total Leisure Services Exp (2026)
1	21,295	1,617	34,426,349	22,148	1,656	36,671,146	22,574	1,709	38,587,612	23,261	1,751	40,723,780	23,545	1,822	42,896,873	24,374	1,896	46,212,269
2	20,740	1,673	34,698,227	21,571	1,713	36,960,752	21,986	1,769	38,892,353	22,655	1,812	41,045,392	22,932	1,885	43,235,647	23,739	1,962	46,577,225
3	16,884	1,747	29,503,102	17,560	1,790	31,426,874	17,898	1,848	33,069,270	18,443	1,892	34,899,949	18,668	1,969	36,762,272	19,326	2,049	39,603,539
4	12,015	1,739	20,894,806	12,496	1,781	22,257,268	12,737	1,839	23,420,452	13,124	1,883	24,716,983	13,285	1,960	26,035,925	13,752	2,040	28,048,179
5	21,161	2,175	46,023,694	21,661	2,228	48,251,753	22,280	2,300	51,237,706	21,609	2,355	50,895,513	21,661	2,451	53,093,270	22,004	2,551	56,124,526
6	14,711	1,884	27,708,169	15,278	1,929	29,472,875	15,639	1,992	31,145,858	15,783	2,040	32,192,062	15,640	2,123	33,197,624	16,189	2,209	35,759,244
7	25,483	1,686	42,973,512	26,424	1,727	45,639,073	27,586	1,783	49,188,409	28,540	1,826	52,120,828	29,977	1,900	56,969,105	31,475	1,978	62,247,414
8	25,628	1,820	46,631,940	26,735	1,864	49,823,662	27,863	1,924	53,606,923	28,934	1,970	57,014,416	30,076	2,051	61,672,970	31,523	2,134	67,268,054
TOTAL	**157,917**		**282,859,798**	**163,874**		**300,503,404**	**168,563**		**319,148,584**	**172,349**		**333,608,923**	**175,783**		**353,863,688**	**182,382**		**381,840,450**
			282.86			**300.50**			**319.15**			**333.61**			**353.86**			**381.84**

Notes:

1. Population data were sourced from MapInfo and Oxford Economics (mid-year 2006). The population was projected forward using population multipliers obtained from Cambridgeshire County Council and derived from ONS 2006-based Subnational Population Projections (published 12 June 2008).
2. 2006-based per capita leisure expenditure data were sourced from Pitney Bowes MapInfo, and then adjusted to reflect Experian's 'leisure service categories'. The per capita expenditure was projected forward at a rate of 0.8% per annum (as per Experian Retail Planner Briefing Note 6.1, Table 3.2 - Consensus Forecast).

	CHANGE	
Period	**(%)**	**(£m)**
2009-13	6.20%	18.65
2009-16	11.02%	33.11
2009-21	17.76%	53.36
2009-26	27.07%	81.34

APPENDIX TWO

Performance Analysis: Indicators, Methodology and Data Sources

PERFORMANCE ANALYSES – THE PPS6 INDICATORS

Introduction

1.1 We have undertaken a 'performance analysis' (commonly referred to as a 'health check') for each of the four Market Towns (Wisbech, March, Chatteris and Whittlesey) in Fenland District, as identified in the adopted Fenland District Local Plan, using the indicators of vitality and viability listed in the bullets following paragraph 4.4 of PPS6. 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 main report; and it will provide the base position for future monitoring of town centre vitality and viability.

The PPS6 Indicators

1.2 PPS6 makes it clear that LPAs should plan positively for the growth and development of town centres, making provision for the full range of town centre uses. Accordingly, the indicators listed under paragraph 4.4 of PPS6 cover other uses as well as retail. The performance analyses, where relevant, make reference to the District-wide retail study which we undertook for the Council in 2006.

1.3 Below, we provide a brief overview of each of the PPS6 indicators – as well as an additional indicator not listed in PPS6, namely movement in the national retail rankings – together with details of the data sources that we used. The detailed performance analysis data are contained in Appendix 3. Due to a lack of published data, particularly for the smaller centres of Whittlesey and Chatteris, it has not been possible in every case to provide a detailed analysis based on all of the indicators. Where this applies, we have instead provided a succinct overview of performance and general health based on our on-foot surveys and using any data that are available.

Movement in the National Retail Rankings

1.4 We have charted the movement in the national (UK) retail rankings experienced by the Fenland study centres, as shown in Table 1 of Appendix 3, using time-series data from Management Horizons Europe's (MHE) *UK Shopping Index* (for the years 2000/01, 2003/04, and 2008).

1.5 The 2008 version of the MHE Index is based on a weighted count of retailer presence by location, which considers anchor stores, speciality stores, service operators, supermarkets, out-of-town formats and factory outlets. Anchor stores, such as John Lewis, Marks & Spencer and Debenhams, are given a higher score than other multiple operators in order to reflect their major influence on non-food shopping patterns. Thus, for example, the presence of a Debenhams store would provide a centre with 10 points, and a Primark store is worth 7 points.

1.6 The MHE 2008 Index also for the first time scores restaurants, coffee shops and high street food outlets (for example, McDonalds, Starbucks and Greggs). As a result of this change to the scoring, it is not appropriate to compare a centre's absolute score in MHE's 2008 Index with those in previous Indexes. However, the relative rankings can generally still be usefully compared.

1.7 It is also worth noting that whereas MHE's 2003/04 Index ranked the UK's top 1,672 retail centres, its 2008 Index now considers some 6,720 centres in the UK. Caution, therefore, needs to be exercised in considering slippage in the retail rankings of low-ranked centres (particularly local centres) between 2003/04 and 2008, which might in part be due to the greater number of centres included in the different Indexes, rather than a particular deterioration of the centres' retail offer.

1.8 It is also worth emphasising that the MHE Index is based on the presence of national multiple outlets, with no credit given for the presence of independent operators. Thus, analysis of a centre's movement in the national retail rankings can be a rather blunt tool, and so other indicators – which consider the presence and quality of independent operators – are also of utility in the case of centres which contain few multiple outlets.

Diversity of Main Town Centre Uses (by Number, Type and Amount of Floorspace)

1.9 PPS6 advises that LPAs should monitor the amount of space in use for different functions, such as offices; shopping; leisure, cultural and entertainment activities; pubs, cafés and restaurants; and hotels.

1.10 The standard source of data on the diversity of retail uses in larger town centres is Experian's Goad Centre Reports. Whilst these are available for each of the four principal centres in Fenland, Experian has advised us that its centre surveys for Whittlesey and Chatteris were undertaken in 2005, although not published until more recently. Rather than relying on likely out-of-date information, we have instead conducted our own on-foot land-use audits of retail and service uses in these centres, from which we have assessed the diversity of uses in each centre. The data in relation to diversity of retail and service uses for the study centres are provided as Tables 2 to 5 of Appendix 3.

1.11 Data are also available for each of the four centres from the DCLG's 'State of the Cities Database' (SOCD). The SOCD contains data on key indicators of 'urban performance' used in the State of the English Cities Report, published in March 2006 by the ODPM[1].

1.12 To assess the diversity of uses in the Fenland study centres, we have also interrogated the SOCD for a number of comparator centres; these are the same as the ones we used in our 2006 study. As such, we have collected data for a number of higher-order centres (namely Bury St Edmunds, Cambridge, King's Lynn and Peterborough), which residents of the District are likely to travel to for their main comparison shopping, and district-level centres which can be considered to have comparable retail offers and catchments to the larger Fenland centres of Wisbech and March. Accordingly, we have also collected data for Ely, Huntingdon, Newmarket, St Neots and Thetford (which we consider reasonable comparators for Wisbech), and Diss, Haverhill, St Ives and Stowmarket (which can be regarded as benchmark centres for March). We do not consider it appropriate to present information on comparators for Whittlesey and Chatteris, given the small size of the centres and their predominantly localised role in the District.

1.13 For each centre, the SOCD specifies the amount of floorspace in the '*A1 shops*', '*A2 (financial and professional services)*'; '*A3 (food and drink')*[2]; and '*offices*' sectors. The SOCD does not include data on the amount of commercial leisure floorspace; the best proxy is therefore the '*A3 (food and drink)'* data.

1.14 It should be noted that the latest available data in the SOCD are for the year 2004. However, unless there has been a substantial amount of recent development in a particular centre, the data from the SOCD will provide a reasonably good indication of the diversity of uses that are present in a given centre. We are not aware of any significant retail, commercial or food and drink schemes which have come forward in any of the District's centres.

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[1] The data are provided for 'Areas of Town Centre Activity' (ATCA); further details on the ATCA can be found here: http://www.socd.communities.gov.uk/SOCD/overview.aspx#Geog (note that the ATCA boundaries do not correspond to policy boundaries as defined in local development plans).

[2] 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.

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

1.15 The rural nature of Fenland District ensures that there is relatively little out-of-centre retail floorspace; that which is present is predominantly concentrated in Wisbech, at Belgrave Retail Park (circa 50,000 sq.ft), which includes representation from Carpetright, Currys, Dunelm Mill and Halfords; and the larger Peel Centre (circa 96,000 sq.ft), anchored by B&Q, Anglia Home Furnishings and a Co-Op foodstore. There is also a small concentration of out-of-centre retailing at the March Trading Estate, including a Tesco foodstore and Focus DIY store, as well as the Meadowlands Retail Park in March, which recently opened at Wisbech Road approximately a mile from the town centre and is occupied by Halfords, Carpetright, Argos Extra and Mattressman.

1.16 The Council's most recent Annual Monitoring Report (2007-08), published in December 2008, provides a breakdown of the amount of retail, office and leisure floorspace completed in the District for each monitoring year, although no distinction is made between in-centre and out-of-centre development. Indicator B4 shows that across the District, 16,642 sq.m of class A1 retail floorspace was completed between 1999 and 2008, including 2,463 sq.m in the monitoring year 2007-08. Similar levels of retail floorspace completions can be observed for the reporting periods 2003-04 onwards, bar a drop to circa 1,000 sq.m in 2006-07. Since 1999, a total of 1,135 sq.m has been developed for Use Class A2 (financial and professional services), and 14,090 sq.m for Use Class B1 (offices). The amount of leisure floorspace (Use Class D2) completed has been relatively limited, however, amounting to just 310 sq.m since 1999.

1.17 There has been pressure for additional out-of-centre retail development in both Wisbech and March over recent years, and we consider this in more detail in Section 3 of our main report. There is less pressure for out-of-centre development in Whittlesey and Chatteris and, given the lack of data available, we do not cover this indicator in our performance analyses for these two centres. Overall, however, 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.

The Potential Capacity for Growth or Change of Centres in the Network

1.18 We have undertaken on-foot surveys of each of the four study centres to identify physical opportunities for town centre uses. Wisbech is physically constrained, and there is unlikely to be sufficient demand to extend the centres of Whittlesey and

Chatteris. There may, however, be scope for a town centre scheme in March town centre.

Retailer Representation and Intentions to Change Representation

1.19 MHE categorises fashion retailers as 'luxury', 'upper', 'upper-middle', 'middle', 'lower-middle' or 'value'. In its 2008 Shopping Index, MHE assigns an overall rating for each strategic centre, based on the predominant type of fashion retailer that is currently represented.

1.20 In terms of potential retailer interest, the commercial organisation, FOCUS, collects data on documented retailer requirements (for national multiple operators), and publishes the data twice-yearly. FOCUS also produces Town Reports for main centres, which include time-series data on the number of retail requirements. Unfortunately the only centre in the District for which a Town Report is available is Wisbech.

1.21 It should be noted that the level of demand for any centre is always influenced by whether any new development is proposed; hence if a major new development scheme was to emerge, the number of requirements would be expected to show a noticeable increase.

Shopping Rents and Yields

1.22 Of the Fenland study centres, published time-series retail rental data are only available for Wisbech, and published time-series data on the movement in retail yields are only available for Wisbech and March. Given their small size, we have not been able to source information on prime rents and yields for Whittlesey and Chatteris.

Proportion of Vacant Street Level Property

1.23 The standard source of vacancy data for larger centres is Experian's Goad Centre Reports, although in Fenland, recent Goad Centre Reports are only available for Wisbech and March. For Whittlesey and Chatteris we therefore undertook our own land use audit in January 2009.

Pedestrian Flows (Footfall)

1.24 We are not aware of any formal, pedestrian flow surveys in any of the study centres in recent years. Therefore our assessment of pedestrian flows is based on observations made during our site visits to the centres in January 2009.

Accessibility

1.25 If we identified any particular accessibility issues when we undertook our on-foot surveys of the centres, then appropriate commentary is provided in the relevant performance analysis.

Customer and Residents' Views and Behaviour

1.26 A survey of pedestrians and/or local residents was not undertaken as part of this study and so we have not collated any survey evidence in relation to attitudes, perceptions, desires and so on. Accordingly, this indicator is not covered in our performance analyses.

Perception of Safety and Occurrence of Crime

1.27 Under this indicator we provide an assessment of the perception of safety in each of the study centres, as well as any notable instances of occurrence of crime. This was based our visits to the centres in January 2009.

State of the Town Centre Environmental Quality

1.28 Under this indicator we provide our assessment of the physical appearance of the centres, based on our field visits in January 2009.

APPENDIX THREE

Performance Analysis Data

Figure 1 Experian Goad Definition of Wisbech Town Centre

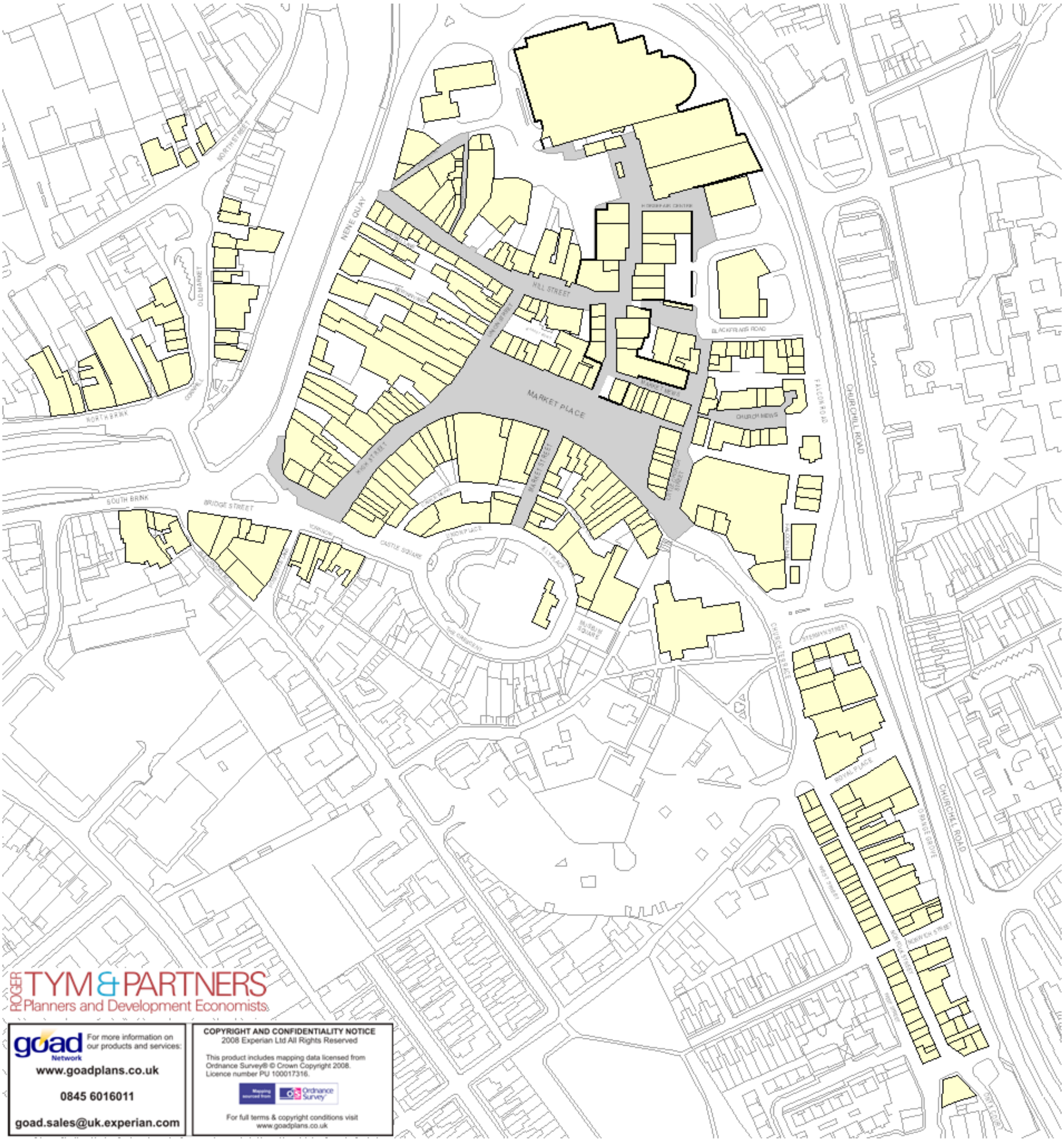


Figure 2 Location of Vacant Units in Wisbech Town Centre

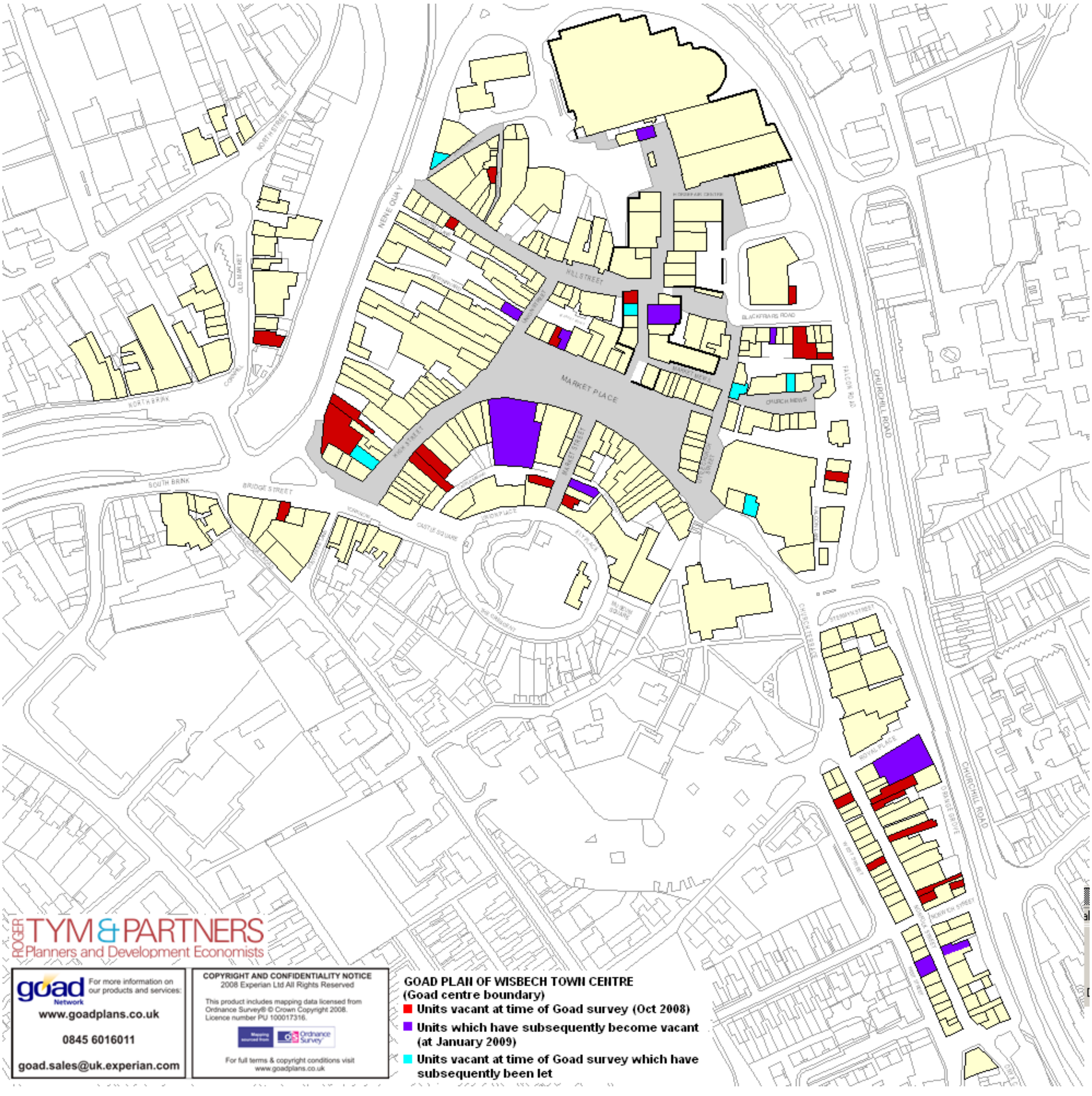


Figure 3 Experian Goad Definition of March Town Centre

Figure 4 Location of Vacant Units in March Town Centre

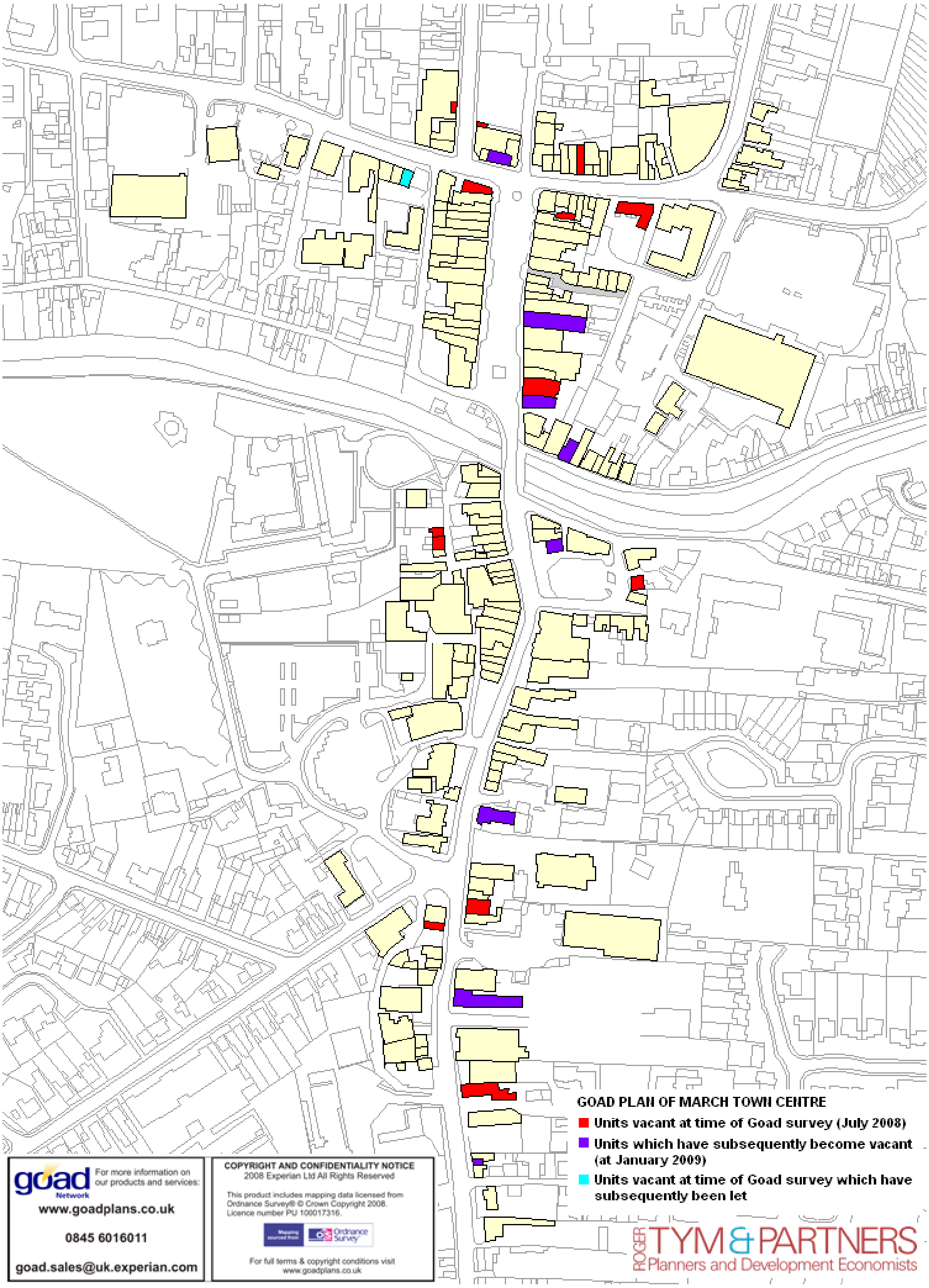


Table 1 Change in the National Retail Rankings, 2000-2008

MHE Retail Rankings

Centre	Management Horizons Europe Centre Rankings 2000-2004				Management Horizons Europe Centre Rankings, 2008		
	MHE Location Grade	MHE 'Glam Glum Index' [A]	MHE 2000/01 Rank [B]	MHE 2003/04 Rank [B]	MHE 2008 Location Grade	Fashion Market Position[C]	MHE 2008 Rank
Bury St Edmunds	Sub-Regional	Mister Average	176	208	Major District	Middle	221
Cambridge	Regional	Glam	47	68	Regional	Middle	74
Chatteris	-	-	-	-	Local	Middle	2,046
Diss	District	-	572	546	Minor District	Middle	600
Ely	District	-	406	367	District	Middle	424
Haverhill	District	-	421	546	Minor District	Lower	835
Huntingdon	Major District	-	357	336	Major District	Middle	343
King's Lynn	Regional	Mister Average	132	132	Sub-Regional	Middle	121
March	District	-	670	565	Minor District	Middle	779
Newmarket	District	-	347	374	District	Middle	387
Peterborough	Regional	Mister Average	42	46	Major Regional	Middle	43
St Ives (Cambs)	Minor District	-	-	602	Minor District	Middle	731
St Neots	District	-	421	421	District	Middle	511
Stowmarket	District	-	497	565	Minor District	Lower	669
Thetford	District		461	502	District	Lower	570
Whittlesey	-	-	-	-	Minor Local	Middle	3,120
Wisbech	District	-	368	382	District	Lower	511

NOTES

We have analysed the shopping indexes produced by Management Horizons Europe (MHE), in order to assess change in retail rankings over time (2000 - 2008). MHE published Shopping Indexes in 2000/01, 2003/04 and 2008. In earlier Indexes, MHE ranked the UK's top 1,672 retail centres, but MHE's 2008 Index ranks the UK's top 6,720 centres.

[A] MHE's Glam-Glum index illustrates the relative attractive of a venue in terms of the quality of its fashion offer. Each retailer present in the fashion sector is given one of six ratings, from 'lower' to 'luxury'; the overall Glam-Glum rating of the centre then represents the average market position of that location's fashion offer.

[B] London, West End (highest ranking Major City) ranked 1; Reading (highest Major Regional) 12; Derby (highest Regional) 58; Aylesbury (highest Sub-Regional) 117; Cwmbran (highest Major District) 218; Guernsey, St Peter Port (highest District) 367; Enfield, Enfield Retail Park (highest Minor District) 581; Dover, Whitfield (highest Local) 1207; and Chelmford, Moulsham (highest Minor Local) 2247.

[C] MHE's 2008 'Fashion Market Position' is similar to the former Glam-Glum index, and assesses retailers across a spectrum running from 'luxury' to 'value'.

Table 2 Wisbech Town Centre: Goad Diversity of Uses
(Surveyed October 2008; compared against September 2008 UK Averages)

Goad Code	Operator Type	UK Average	No. (Centre)	% (Centre)	Difference to UK Avg	Index (UK 100)
	Number (and %) of Convenience Goods Outlets					
G1A	Bakers	1.91%	2	0.82%	-1.09%	43
G1B	Butchers	0.73%	2	0.82%	0.09%	113
G1C	Greengrocers & fishmongers	0.64%	0	0.00%	-0.64%	0
G1D	Grocery and frozen foods	2.85%	5	2.06%	-0.79%	72
G1E	Off-licences and home brew	0.67%	0	0.00%	-0.67%	0
G1F	Confectioners, tobacconists, newsagents	2.29%	5	2.06%	-0.23%	90
	TOTAL	9.08%	14	5.76%	-3.32%	63
	Number (and %) of Comparison Goods Outlets					
G2A	Footwear & repairs	2.29%	5	2.06%	-0.23%	90
G2B	Men's & boys' wear	1.19%	3	1.23%	0.04%	104
G2C	Women's, girls, children's clothing	5.50%	14	5.76%	0.26%	105
G2D	Mixed and general clothing	3.39%	6	2.47%	-0.92%	73
G2E	Furniture, carpets & textiles	3.89%	8	3.29%	-0.60%	85
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4.08%	11	4.53%	0.45%	111
G2G	Electrical, home entertainment, telephones and video	4.47%	12	4.94%	0.47%	110
G2H	DIY, hardware & household goods	2.81%	5	2.06%	-0.75%	73
G2I	Gifts, china, glass and leather goods	1.63%	2	0.82%	-0.81%	50
G2J	Cars, motorcycles & motor accessories	1.29%	0	0.00%	-1.29%	0
G2K	Chemists, toiletries & opticians	3.97%	12	4.94%	0.97%	124
G2L	Variety, department & catalogue showrooms	0.92%	4	1.65%	0.73%	179
G2M	Florists and gardens	0.99%	3	1.23%	0.24%	125
G2N	Sports, toys, cycles and hobbies	2.34%	4	1.65%	-0.69%	70
G2O	Jewellers, clocks & repair	2.32%	2	0.82%	-1.50%	35
G2P	Charity shops, pets and other comparison	3.72%	18	7.41%	3.69%	199
	TOTAL	44.80%	109	44.86%	0.06%	100
	Number (and %) of Service Uses					
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	14.50%	27	11.11%	-3.39%	77
G3B	Hairdressers, beauty parlours & health centres	7.43%	20	8.23%	0.80%	111
G3C	Laundries & drycleaners	0.95%	1	0.41%	-0.54%	43
G3D	Travel agents	1.54%	4	1.65%	0.11%	107
G3E	Banks & financial services (incl. accountants)	4.37%	13	5.35%	0.98%	122
G3F	Building societies	0.66%	2	0.82%	0.16%	125
G3G	Estate agents & auctioneers	3.94%	14	5.76%	1.82%	146
	TOTAL	33.39%	81	33.33%	-0.06%	100
	Number (and %) of Miscellaneous Uses					
G4A	Employment, careers, Post Offices and information	1.29%	10	4.12%	2.83%	319
G4B	Vacant units (all categories)	11.44%	29	11.93%	0.49%	104
	TOTAL	12.73%	39	16.05%	3.32%	126
	GRAND TOTAL	100.00%	243	100.00%		

Table 3 March Town Centre: Goad Diversity of Uses
(Surveyed July 2008; compared against September 2008 UK Averages)

Goad Code	Operator Type	UK Average	No. (Centre)	% (Centre)	Difference to UK Avg	Index (UK 100)
	Number (and %) of Convenience Goods Outlets					
G1A	Bakers	1.91%	3	1.96%	0.05%	103
G1B	Butchers	0.73%	1	0.65%	-0.08%	90
G1C	Greengrocers & fishmongers	0.64%	0	0.00%	-0.64%	0
G1D	Grocery and frozen foods	2.85%	4	2.61%	-0.24%	92
G1E	Off-licences and home brew	0.67%	0	0.00%	-0.67%	0
G1F	Confectioners, tobacconists, newsagents	2.29%	2	1.31%	-0.98%	57
	TOTAL	9.08%	10	6.54%	-2.54%	72
	Number (and %) of Comparison Goods Outlets					
G2A	Footwear & repairs	2.29%	3	1.96%	-0.33%	86
G2B	Men's & boys' wear	1.19%	2	1.31%	0.12%	110
G2C	Women's, girls, children's clothing	5.50%	5	3.27%	-2.23%	59
G2D	Mixed and general clothing	3.39%	6	3.92%	0.53%	116
G2E	Furniture, carpets & textiles	3.89%	3	1.96%	-1.93%	50
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4.08%	6	3.92%	-0.16%	96
G2G	Electrical, home entertainment, telephones and video	4.47%	7	4.58%	0.11%	102
G2H	DIY, hardware & household goods	2.81%	5	3.27%	0.46%	116
G2I	Gifts, china, glass and leather goods	1.63%	4	2.61%	0.98%	160
G2J	Cars, motorcycles & motor accessories	1.29%	4	2.61%	1.32%	203
G2K	Chemists, toiletries & opticians	3.97%	4	2.61%	-1.36%	66
G2L	Variety, department & catalogue showrooms	0.92%	2	1.31%	0.39%	142
G2M	Florists and gardens	0.99%	4	2.61%	1.62%	264
G2N	Sports, toys, cycles and hobbies	2.34%	4	2.61%	0.27%	112
G2O	Jewellers, clocks & repair	2.32%	2	1.31%	-1.01%	56
G2P	Charity shops, pets and other comparison	3.72%	13	8.50%	4.78%	228
	TOTAL	44.80%	74	48.37%	3.57%	108
	Number (and %) of Service Uses					
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	14.50%	18	11.76%	-2.74%	81
G3B	Hairdressers, beauty parlours & health centres	7.43%	14	9.15%	1.72%	123
G3C	Laundries & drycleaners	0.95%	1	0.65%	-0.30%	69
G3D	Travel agents	1.54%	2	1.31%	-0.23%	85
G3E	Banks & financial services (incl. accountants)	4.37%	7	4.58%	0.21%	105
G3F	Building societies	0.66%	2	1.31%	0.65%	198
G3G	Estate agents & auctioneers	3.94%	9	5.88%	1.94%	149
	TOTAL	33.39%	53	34.64%	1.25%	104
	Number (and %) of Miscellaneous Uses					
G4A	Employment, careers, Post Offices and information	1.29%	2	1.31%	0.02%	101
G4B	Vacant units (all categories)	11.44%	14	9.15%	-2.29%	80
	TOTAL	12.73%	16	10.46%	-2.27%	82
	GRAND TOTAL	100.00%	153	100.00%		

Table 4 Whittlesey Town Centre: Goad Diversity of Uses
(Surveyed by RTP January 2009; compared against September 2008 UK Averages)

Goad Code	Operator Type	UK Average	No. (Centre)	% (Centre)	Difference to UK Avg	Index (UK 100)
	Number (and %) of Convenience Goods Outlets					
G1A	Bakers	1.91%	1	0.97%	-0.94%	51
G1B	Butchers	0.73%	2	1.94%	1.21%	266
G1C	Greengrocers & fishmongers	0.64%	1	0.97%	0.33%	152
G1D	Grocery and frozen foods	2.85%	2	1.94%	-0.91%	68
G1E	Off-licences and home brew	0.67%	0	0.00%	-0.67%	0
G1F	Confectioners, tobacconists, newsagents	2.29%	3	2.91%	0.62%	127
	TOTAL	9.08%	9	8.74%	-0.34%	96
	Number (and %) of Comparison Goods Outlets					
G2A	Footwear & repairs	2.29%	1	0.97%	-1.32%	42
G2B	Men's & boys' wear	1.19%	0	0.00%	-1.19%	0
G2C	Women's, girls, children's clothing	5.50%	8	7.77%	2.27%	141
G2D	Mixed and general clothing	3.39%	1	0.97%	-2.42%	29
G2E	Furniture, carpets & textiles	3.89%	2	1.94%	-1.95%	50
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4.08%	2	1.94%	-2.14%	48
G2G	Electrical, home entertainment, telephones and videc	4.47%	3	2.91%	-1.56%	65
G2H	DIY, hardware & household goods	2.81%	5	4.85%	2.04%	173
G2I	Gifts, china, glass and leather goods	1.63%	5	4.85%	3.22%	298
G2J	Cars, motorcycles & motor accessories	1.29%	1	0.97%	-0.32%	75
G2K	Chemists, toiletries & opticians	3.97%	4	3.88%	-0.09%	98
G2L	Variety, department & catalogue showrooms	0.92%	1	0.97%	0.05%	106
G2M	Florists and gardens	0.99%	3	2.91%	1.92%	294
G2N	Sports, toys, cycles and hobbies	2.34%	1	0.97%	-1.37%	41
G2O	Jewellers, clocks & repair	2.32%	0	0.00%	-2.32%	0
G2P	Charity shops, pets and other comparison	3.72%	4	3.88%	0.16%	104
	TOTAL	44.80%	41	39.81%	-4.99%	89
	Number (and %) of Service Uses					
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	14.50%	14	13.59%	-0.91%	94
G3B	Hairdressers, beauty parlours & health centres	7.43%	10	9.71%	2.28%	131
G3C	Laundries & drycleaners	0.95%	1	0.97%	0.02%	102
G3D	Travel agents	1.54%	1	0.97%	-0.57%	63
G3E	Banks & financial services (incl. accountants)	4.37%	6	5.83%	1.46%	133
G3F	Building societies	0.66%	3	2.91%	2.25%	441
G3G	Estate agents & auctioneers	3.94%	5	4.85%	0.91%	123
	TOTAL	33.39%	40	38.83%	5.44%	116
	Number (and %) of Miscellaneous Uses					
G4A	Employment, careers, Post Offices and information	1.29%	1	0.97%	-0.32%	75
G4B	Vacant units (all categories)	11.44%	12	11.65%	0.21%	102
	TOTAL	12.73%	13	12.62%	-0.11%	99
	GRAND TOTAL	100.00%	103	100.00%		

Table 5 Chatteris Town Centre: Goad Diversity of Uses
(Surveyed by RTP January 2009; compared against September 2008 UK Averages)

Goad Code	Operator Type	UK Average	No. (Centre)	% (Centre)	Difference to UK Avg	Index (UK 100)
	Number (and %) of Convenience Goods Outlets					
G1A	Bakers	1.91%	1	1.54%	-0.37%	81
G1B	Butchers	0.73%	1	1.54%	0.81%	211
G1C	Greengrocers & fishmongers	0.64%	0	0.00%	-0.64%	0
G1D	Grocery and frozen foods	2.85%	2	3.08%	0.23%	108
G1E	Off-licences and home brew	0.67%	0	0.00%	-0.67%	0
G1F	Confectioners, tobacconists, newsagents	2.29%	3	4.62%	2.33%	202
	TOTAL	9.08%	7	10.77%	1.69%	119
	Number (and %) of Comparison Goods Outlets					
G2A	Footwear & repairs	2.29%	1	1.54%	-0.75%	67
G2B	Men's & boys' wear	1.19%	0	0.00%	-1.19%	0
G2C	Women's, girls, children's clothing	5.50%	3	4.62%	-0.88%	84
G2D	Mixed and general clothing	3.39%	1	1.54%	-1.85%	45
G2E	Furniture, carpets & textiles	3.89%	2	3.08%	-0.81%	79
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4.08%	2	3.08%	-1.00%	75
G2G	Electrical, home entertainment, telephones and videc	4.47%	2	3.08%	-1.39%	69
G2H	DIY, hardware & household goods	2.81%	4	6.15%	3.34%	219
G2I	Gifts, china, glass and leather goods	1.63%	0	0.00%	-1.63%	0
G2J	Cars, motorcycles & motor accessories	1.29%	1	1.54%	0.25%	119
G2K	Chemists, toiletries & opticians	3.97%	1	1.54%	-2.43%	39
G2L	Variety, department & catalogue showrooms	0.92%	0	0.00%	-0.92%	0
G2M	Florists and gardens	0.99%	3	4.62%	3.63%	466
G2N	Sports, toys, cycles and hobbies	2.34%	2	3.08%	0.74%	131
G2O	Jewellers, clocks & repair	2.32%	0	0.00%	-2.32%	0
G2P	Charity shops, pets and other comparison	3.72%	5	7.69%	3.97%	207
	TOTAL	44.80%	27	41.54%	-3.26%	93
	Number (and %) of Service Uses					
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	14.50%	6	9.23%	-5.27%	64
G3B	Hairdressers, beauty parlours & health centres	7.43%	6	9.23%	1.80%	124
G3C	Laundries & drycleaners	0.95%	0	0.00%	-0.95%	0
G3D	Travel agents	1.54%	0	0.00%	-1.54%	0
G3E	Banks & financial services (incl. accountants)	4.37%	3	4.62%	0.25%	106
G3F	Building societies	0.66%	0	0.00%	-0.66%	0
G3G	Estate agents & auctioneers	3.94%	5	7.69%	3.75%	195
	TOTAL	33.39%	20	30.77%	-2.62%	92
	Number (and %) of Miscellaneous Uses					
G4A	Employment, careers, Post Offices and information	1.29%	3	4.62%	3.33%	358
G4B	Vacant units (all categories)	11.44%	8	12.31%	0.87%	108
	TOTAL	12.73%	11	16.92%	4.19%	133
	GRAND TOTAL	100.00%	65	100.00%		

Table 6 Change in the Number of Retail Requirements for the Study Centres and the Comparator Centres, 2000-2009

Retail Requirements, 2000-2009

Source: FOCUS Town Reports, March 2009 (Note: FOCUS has not published retail requirement data for the year 2008)

	Apr-00	Oct-00	Apr-01	Oct-01	Apr-02	Oct-02	Apr-03	Oct-03	Apr-04	Oct-04	Apr-05	Oct-05	Apr-06	Oct-06	Apr-07	Oct-07	Jan-09
Bury St Edmunds	31	43	37	36	44	58	55	56	57	58	59	68	62	62	61	71	49
Cambridge	163	172	175	181	204	206	190	192	178	184	201	203	195	176	178	182	121
Chatteris	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Diss	3	2	3	6	7	7	8	9	9	11	11	10	14	13	12	13	9
Ely	8	4	2	2	4	10	11	9	10	11	14	19	18	20	20	22	11
Haverhill	4	3	3	5	6	6	7	10	6	7	6	6	12	9	8	10	8
Huntingdon	18	19	20	20	19	22	26	29	27	28	29	36	40	43	44	40	21
King's Lynn	37	35	37	28	29	37	42	51	41	40	41	39	35	33	27	32	15
March	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Newmarket	20	21	18	22	25	27	30	27	23	27	27	33	30	34	37	33	19
Peterborough	82	68	69	88	92	103	101	111	95	96	104	100	93	98	94	95	66
St Ives (Cambs)	9	6	7	7	7	9	6	7	7	13	13	15	15	16	15	13	9
St Neots	5	5	6	8	11	16	14	16	16	17	18	21	17	16	15	15	14
Stowmarket	4	3	0	6	6	7	7	7	5	8	10	13	10	10	9	12	5
Thetford	5	8	6	8	9	7	8	10	9	10	12	18	15	15	16	11	0
Whittlesey	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Wisbech	9	10	10	9	11	9	8	11	13	12	13	18	18	18	17	23	8

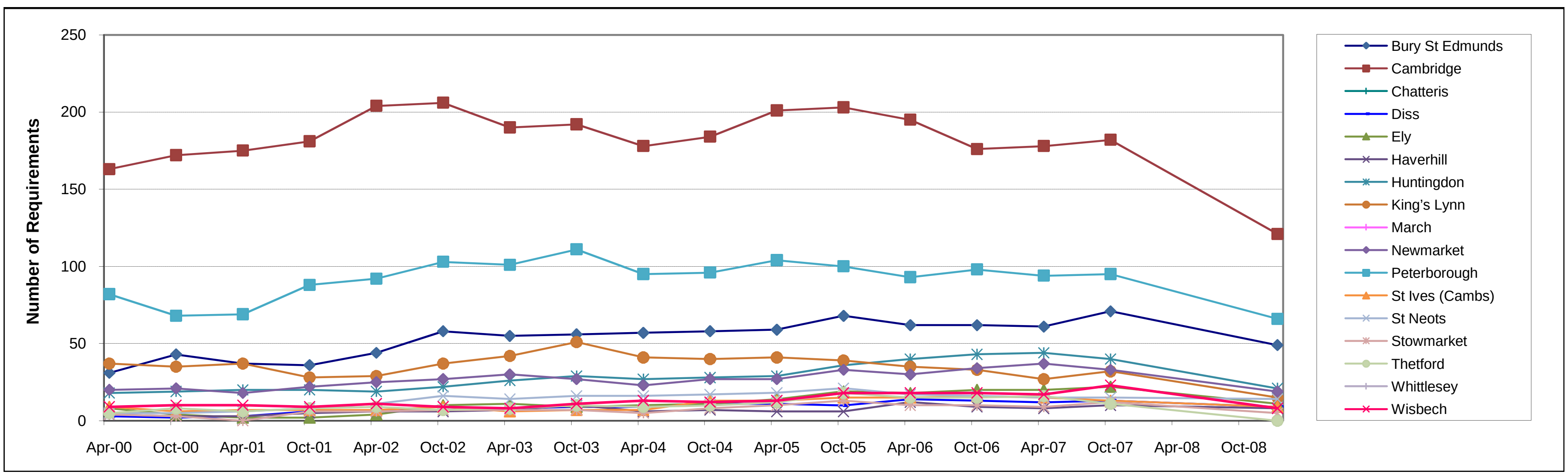


Table 7a Movement in Prime Zone A Retail Rents in the Study Centres and the Comparator Centres, 2000-08

Prime Zone A Retail Rents, 2000-2008

Source: Colliers CRE/Focus Town Reports (2009)

	Jun-00	Jun-01	Jun-02	Jun-03	Jun-04	Jun-05	Jun-06	Jun-07	Jun-08
Bury St Edmunds	90	90	105	105	105	105	105	115	115
Cambridge	225	225	240	240	240	240	240	245	250
Chatteris	-	-	-	-	-	-	-	-	-
Diss	-	-	40	40	45	45	50	50	50
Ely	-	-	45	50	55	60	60	60	60
Haverhill	35	35	40	40	45	45	45	50	50
Huntingdon	60	60	60	60	65	65	65	70	75
King's Lynn	80	80	85	85	85	85	85	85	85
March	-	-	-	-	-	-	-	-	-
Newmarket	50	55	60	60	65	65	65	70	70
Peterborough	200	190	205	205	210	210	210	210	210
St Ives (Cambs)	-	-	-	-	-	-	-	60	-
St Neots	40	40	45	45	45	45	50	55	55
Stowmarket	-	-	-	-	-	-	-	-	-
Thetford	35	40	40	40	45	45	45	50	50
Whittlesey	-	-	-	-	-	-	-	-	-
Wisbech	-	-	-	30	35	40	40	45	45

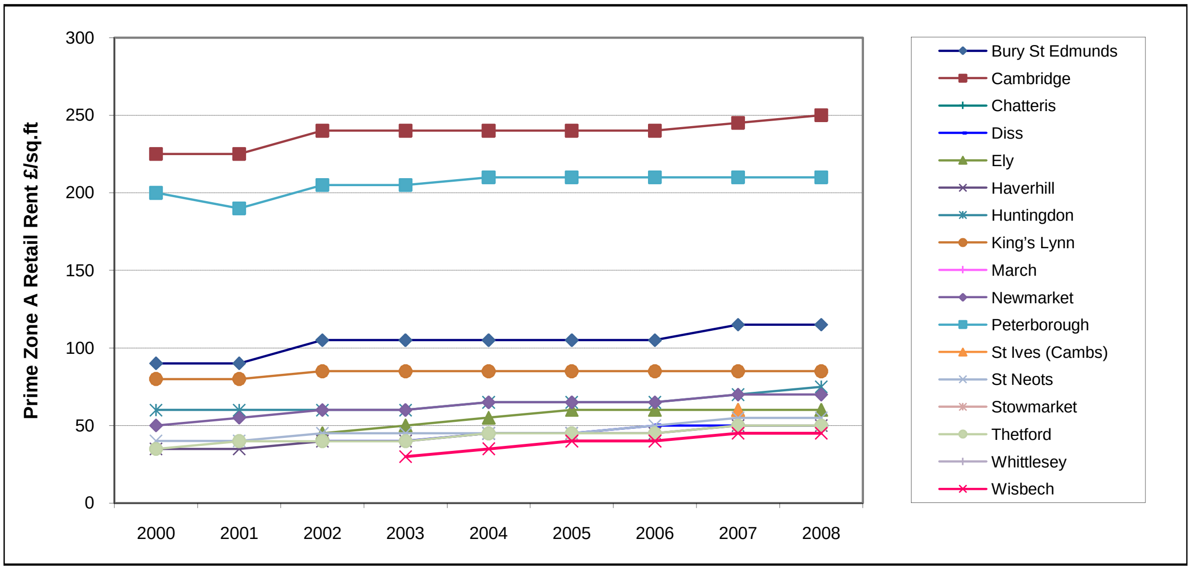


Table 7b Movement in Prime Zone A Retail Rents in the Study Centres and the Comparator Centres - Index, 2000-08

Rents Index, 2000-2008

INDEX

	Jun-00	Jun-01	Jun-02	Jun-03	Jun-04	Jun-05	Jun-06	Jun-07	Jun-08
Bury St Edmunds	100	100	117	117	117	117	117	128	128
Cambridge	100	100	107	107	107	107	107	109	111
Chatteris	-	-	-	-	-	-	-	-	-
Diss	-	-	100	100	113	113	125	125	125
Ely	-	-	100	111	122	133	133	133	133
Haverhill	100	100	114	114	129	129	129	143	143
Huntingdon	100	100	100	100	108	108	108	117	125
King's Lynn	100	100	106	106	106	106	106	106	106
March	-	-	-	-	-	-	-	-	-
Newmarket	100	110	120	120	130	130	130	140	140
Peterborough	100	95	103	103	105	105	105	105	105
St Ives (Cambs)	-	-	-	-	-	-	-	-	-
St Neots	100	100	113	113	113	113	125	138	138
Stowmarket	-	-	-	-	-	-	-	-	-
Thetford	100	114	114	114	129	129	129	143	143
Whittlesey	-	-	-	-	-	-	-	-	-
Wisbech	-	-	-	100	117	133	133	150	150

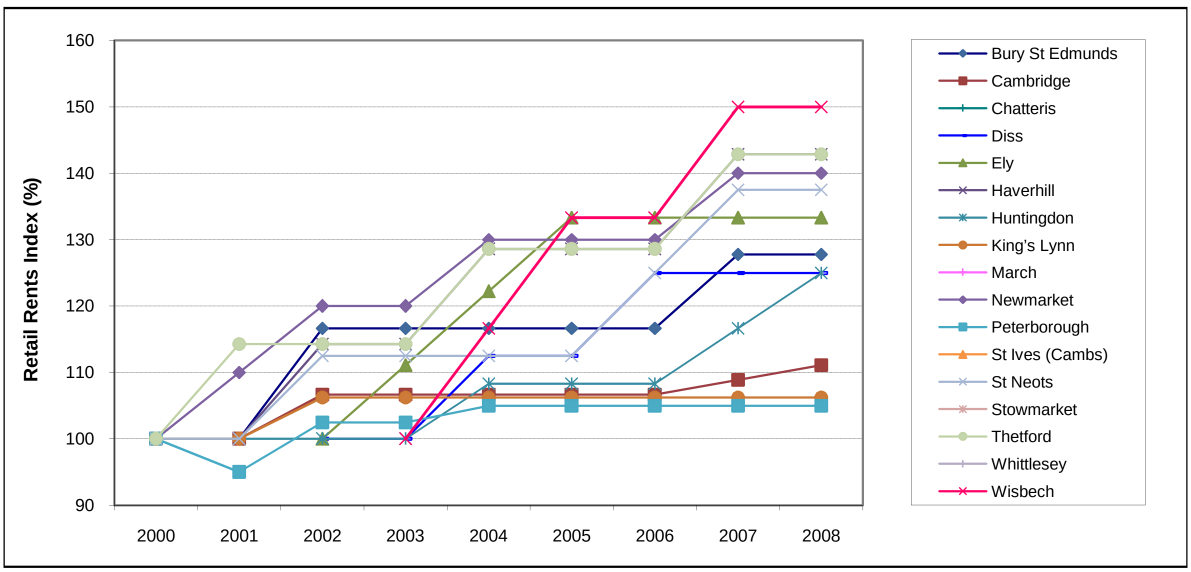
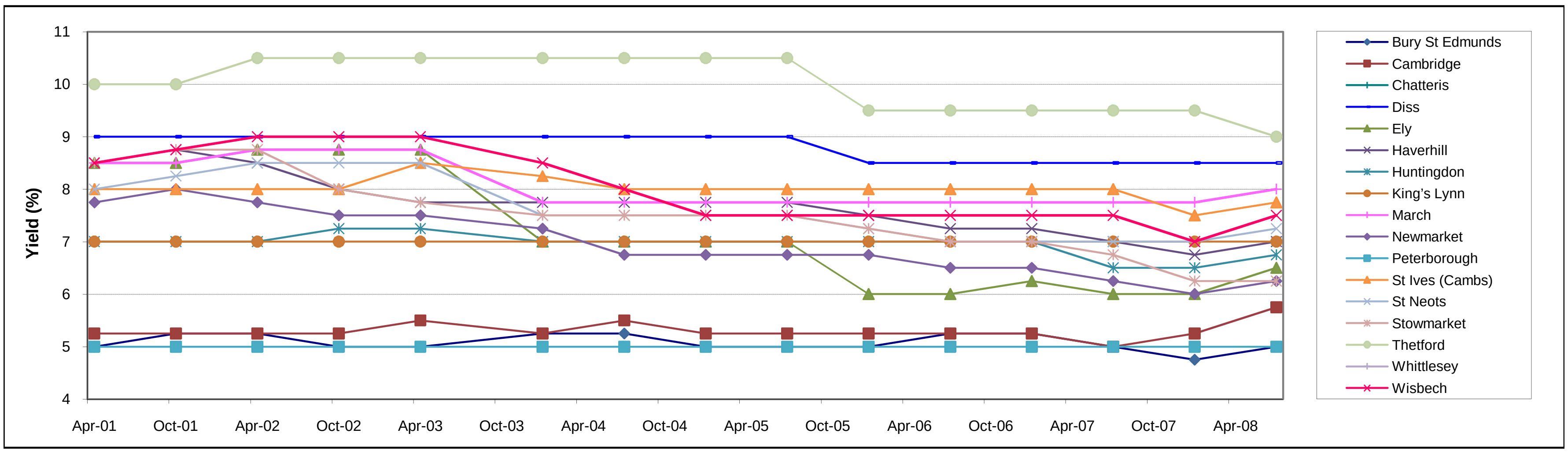


Table 8 Movement in Retail Yields in the Study Centres and the Comparator Centres, 2001-08

Prime Retail Yields, 2001-2008

	Apr-01	Oct-01	Apr-02	Oct-02	Apr-03	Jan-04	Jul-04	Jan-05	Jul-05	Jan-06	Jul-06	Jan-07	Jul-07	Jan-08	Jul-08
Bury St Edmunds	5	5.25	5.25	5	5	5.25	5.25	5	5	5	5.25	5.25	5	4.75	5
Cambridge	5.25	5.25	5.25	5.25	5.5	5.25	5.5	5.25	5.25	5.25	5.25	5.25	5	5.25	5.75
Chatteris	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Diss	9	9	9	9	9	9	9	9	9	8.5	8.5	8.5	8.5	8.5	8.5
Ely	8.5	8.5	8.75	8.75	8.75	7	7	7	7	6	6	6.25	6	6	6.5
Haverhill	8.5	8.75	8.5	8	7.75	7.75	7.75	7.75	7.75	7.5	7.25	7.25	7	6.75	7
Huntingdon	7	7	7	7.25	7.25	7	7	7	7	7	7	7	6.5	6.5	6.75
King's Lynn	7	7	7	7	7	7	7	7	7	7	7	7	7	7	7
March	8.5	8.5	8.75	8.75	8.75	7.75	7.75	7.75	7.75	7.75	7.75	7.75	7.75	7.75	8
Newmarket	7.75	8	7.75	7.5	7.5	7.25	6.75	6.75	6.75	6.75	6.5	6.5	6.25	6	6.25
Peterborough	5	5	5	5	5	5	5	5	5	5	5	5	5	5	5
St Ives (Cambs)	8	8	8	8	8.5	8.25	8	8	8	8	8	8	8	7.5	7.75
St Neots	8	8.25	8.5	8.5	8.5	7.5	7.5	7.5	7.5	7.25	7	7	7	7	7.25
Stowmarket	8.5	8.75	8.75	8	7.75	7.5	7.5	7.5	7.5	7.25	7	7	6.75	6.25	6.25
Thetford	10	10	>=10	>=10	>=10	>=10	>=10	>=10	>=10	9.5	9.5	9.5	9.5	9.5	9
Whittlesey	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Wisbech	8.5	8.75	9	9	9	8.5	8	7.5	7.5	7.5	7.5	7.5	7.5	7	7.5



N.B: For the purposes of the chart, values of >=10 (i.e. for Thetford) have been input as 10.5.

Table 9 State of the Cities Database (SOCD): Change in A1 Retail Floorspace in the Study Centres and Comparator Centres, 2000-2004

A1 retail floorspace (sq.m)

SOURCE: State of the Cities Report, DCLG (September 2008)

	2000	2001	2002	2003	2004
Bury St Edmunds	78,200	90,600	90,400	89,500	90,000
Cambridge	110,800	111,500	117,200	113,200	112,100
Chatteris	-	-	-	-	-
Diss	17,400	16,800	31,500	31,600	33,200
Ely	26,700	27,700	27,600	27,400	28,000
Haverhill	25,900	25,900	26,000	26,200	26,300
Huntingdon	40,600	40,700	40,200	40,700	39,700
King's Lynn	130,600	131,900	130,900	133,900	133,100
March	14,900	14,800	13,200	13,200	13,100
Newmarket	35,400	35,300	35,400	35,400	35,800
Peterborough	182,500	182,700	182,400	181,600	182,000
St Ives (Cambs)	26,600	26,800	26,800	26,800	26,700
St Neots	31,000	30,000	30,400	28,600	29,100
Stowmarket	23,900	22,800	22,900	22,700	23,200
Thetford	14,100	14,300	14,100	15,900	15,700
Whittlesey	8,900	9,000	8,800	8,900	7,700
Wisbech	45,700	44,000	43,900	42,700	42,800

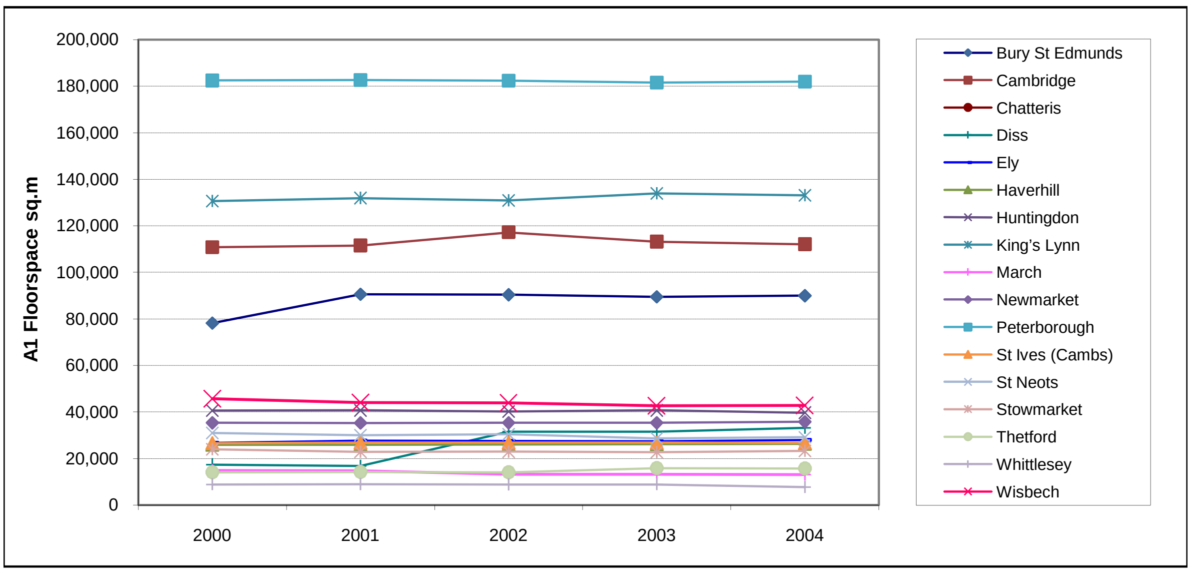


Table 10 State of the Cities Database (SOCD): Change in A2 Financial and Professional Floorspace in the Study Centres and Comparator Centres, 2000-2004

A2 Financial and professional floorspace (sq.m)

SOURCE: State of the Cities Report, DCLG (September 2008)

	2000	2001	2002	2003	2004
Bury St Edmunds	10,300	10,300	10,300	10,300	9,900
Cambridge	19,100	18,700	18,200	18,200	17,800
Chatteris	–	–	–	–	–
Diss	3,500	3,600	3,700	3,600	3,500
Ely	3,200	3,200	3,200	3,300	3,000
Haverhill	3,700	3,700	3,700	3,700	3,700
Huntingdon	5,500	5,500	5,600	5,700	5,700
King's Lynn	11,500	11,900	11,900	11,900	12,100
March	2,500	2,500	2,400	2,400	2,500
Newmarket	4,100	4,300	4,200	4,200	4,200
Peterborough	14,100	15,100	15,100	15,100	14,900
St Ives (Cambs)	3,100	3,100	3,100	3,200	3,200
St Neots	3,500	3,600	3,600	3,200	3,100
Stowmarket	3,800	3,600	3,700	3,700	4,000
Thetford	3,200	3,100	3,100	3,500	3,400
Whittlesey	1,300	1,300	1,200	1,200	1,200
Wisbech	5,700	5,700	4,900	4,800	4,400

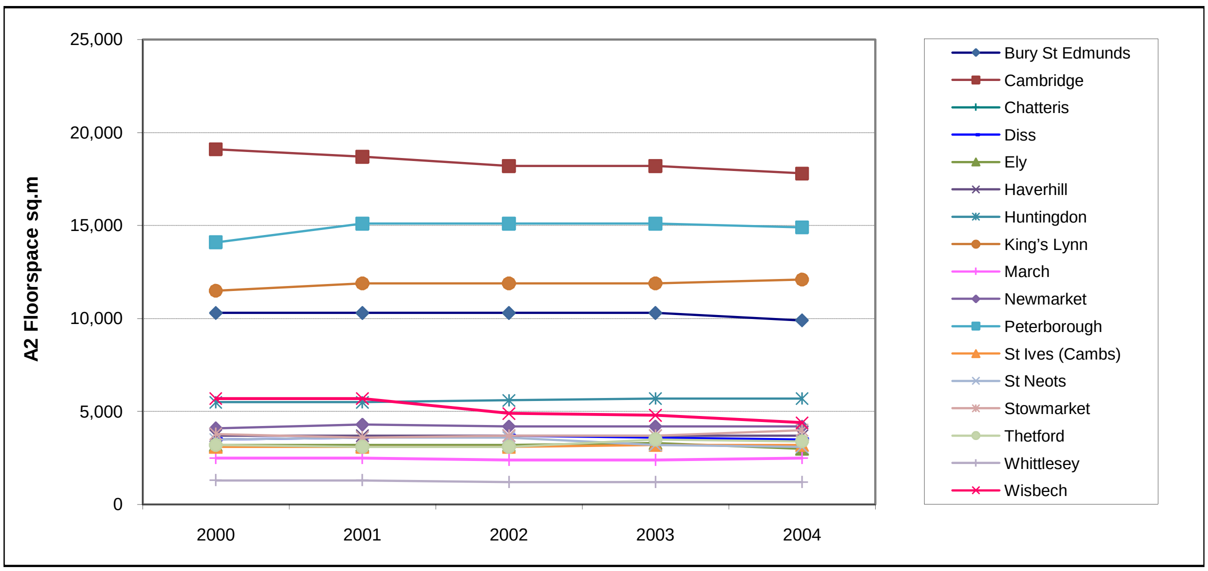


Table 11 State of the Cities Database (SOCD): Change in A3 Food and Drink Floorspace in the Study Centres and Comparator Centres, 2000-2004

A3 Food and drink floorspace (sq.m)

SOURCE: State of the Cities Report, DCLG (September 2008)

	2000	2001	2002	2003	2004
Bury St Edmunds	6,500	6,500	6,500	6,800	6,600
Cambridge	13,900	13,900	14,400	14,600	15,200
Chatteris	–	–	–	–	–
Diss	900	900	900	900	900
Ely	1,800	1,800	2,300	2,500	2,500
Haverhill	900	900	900	900	900
Huntingdon	1,500	1,500	1,400	1,400	1,500
King's Lynn	5,300	5,800	5,800	6,100	6,200
March	600	600	600	600	600
Newmarket	2,000	2,000	2,100	2,100	2,100
Peterborough	9,800	11,000	9,900	11,500	13,000
St Ives (Cambs)	5,200	5,200	5,200	5,100	5,200
St Neots	1,400	1,800	1,900	1,800	2,200
Stowmarket	1,000	900	900	900	900
Thetford	1,000	1,100	1,100	1,600	1,900
Whittlesey	700	800	800	800	–
Wisbech	3,600	3,100	2,800	2,500	2,800

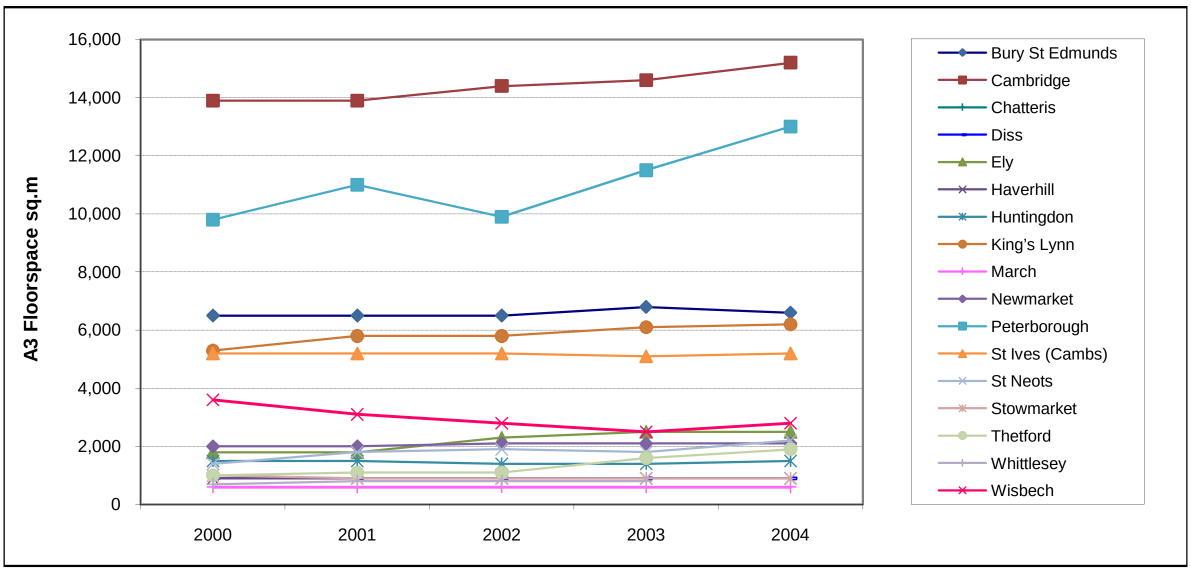
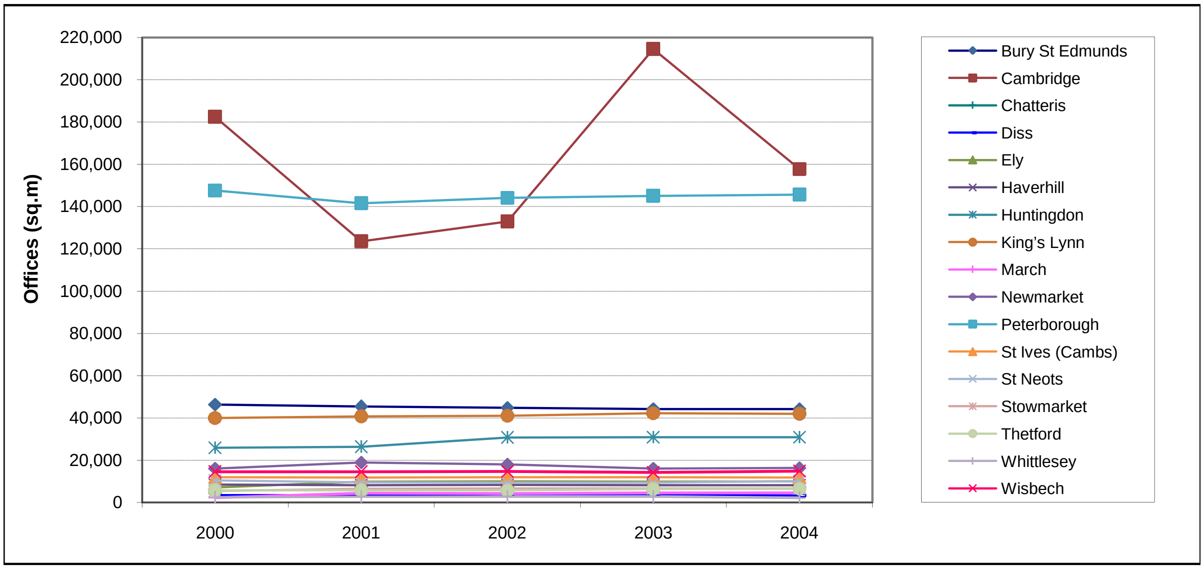


Table 12 State of the Cities Database (SOCD): Change in Office Floorspace in the Study Centres and Comparator Centres, 2000-2004

Amount of office floorspace (sq.m)

SOURCE: State of the Cities Report, DCLG (September 2008)

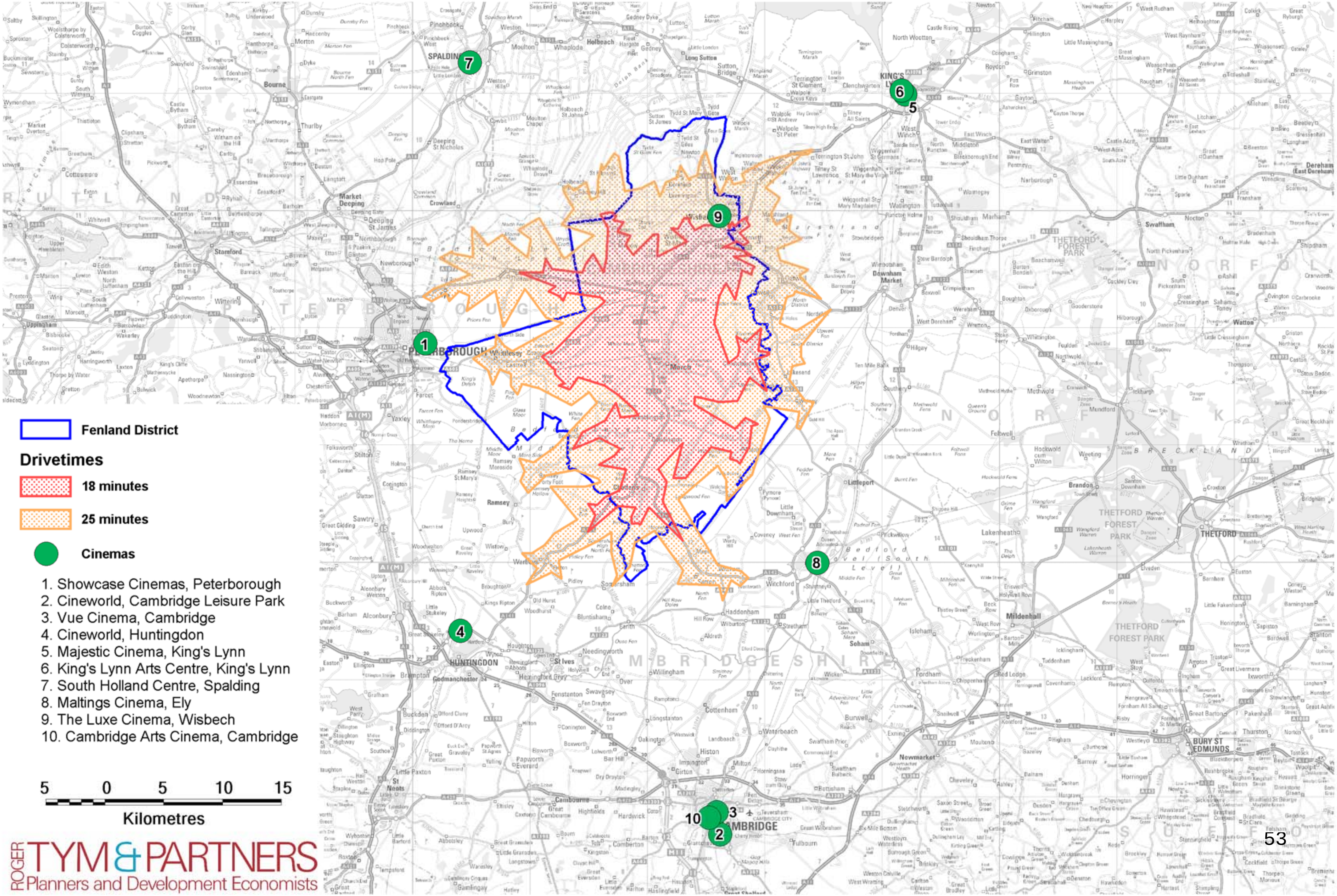
	2000	2001	2002	2003	2004
Bury St Edmunds	46,400	45,400	44,900	44,200	44,200
Cambridge	182,400	123,500	132,900	214,500	157,800
Chatteris	–	–	–	–	–
Diss	3,500	3,500	4,000	3,900	3,400
Ely	7,200	9,900	10,000	9,900	10,000
Haverhill	8,500	8,200	8,400	8,200	8,200
Huntingdon	25,900	26,300	30,700	30,900	30,900
King's Lynn	40,000	40,700	41,100	42,300	41,900
March	2,300	4,400	4,200	4,600	4,600
Newmarket	16,100	19,000	18,100	16,100	16,400
Peterborough	147,700	141,500	144,200	145,000	145,600
St Ives (Cambs)	11,900	11,800	11,900	12,000	11,800
St Neots	10,500	9,600	9,400	9,400	10,100
Stowmarket	5,500	6,500	6,600	6,600	6,700
Thetford	5,700	5,700	5,800	6,400	6,500
Whittlesey	2,400	2,700	2,700	2,700	2,100
Wisbech	14,500	14,500	14,700	14,300	14,800



APPENDIX FOUR

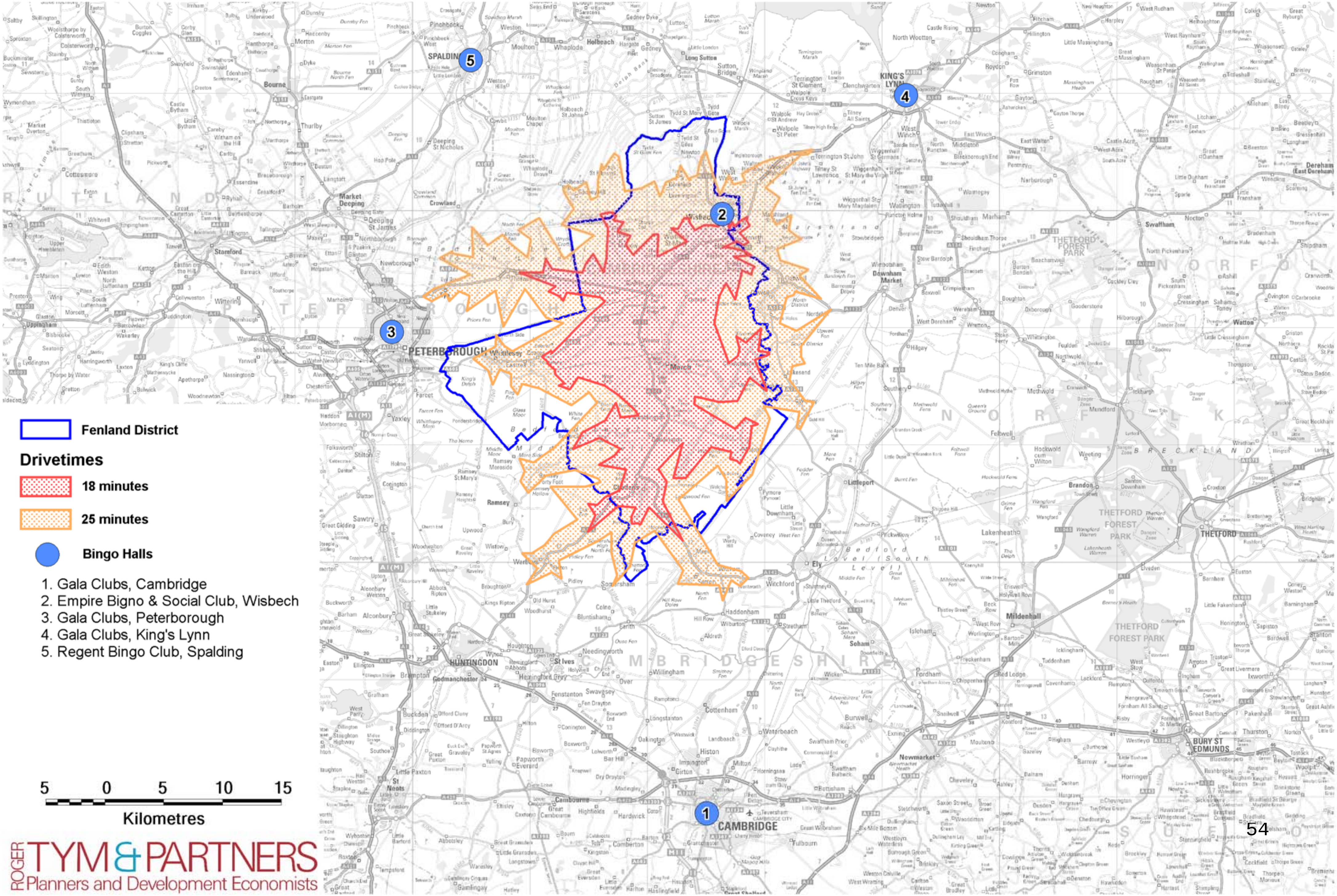
Plans Showing the Location of Existing Commercial Leisure Facilities

LOCATION OF CINEMAS



ROGER TYM & PARTNERS Planners and Development Economists

LOCATION OF BINGO HALLS



APPENDIX FIVE

Initial Appraisal of the Acre Road Site in March

Acre Road/City Road potential redevelopment site, March town centre: Site appraisal

Key to images:
1/ George Campbell Leisure Centre building
2/ Car park adjacent to Leisure Centre
3/ Electricity sub-station to centre of site
4/ Car parking at City Road car park (west side)
5/ Car parking and coach bays at City Road car park (east side, rear of Somerfield)
6/ rear of public house fronting to High Street
7/ low-grade standalone retail use (Gents' barbers) adjacent to City Road car park
8/ Narrow alleyway to side of car park which leads to Connexions premises (shown to the left of the photo) and servicing - dead end, poorly lit
9/ Funeral parlour to south of site (opposite side of City Road)
10/ Police station to south of site (opposite side of City Road)
11/Empty and under-used manufacturing premises which occupy land between Acre Road and the City Road car park. These are poor quality buildings which are in a run-down state.
12/Retail uses on Acre Road - small premises which sell bric-a-brac goods. Some of the premises are vacant.
13/Public house, Acre Road
14/New library building

Note on Site Boundary

It has not been possible to source a definitive boundary of the proposed redevelopment area. The area shown above is therefore taken to be a reasonable assumption of the area which has potential to be redeveloped for retail / mixed uses. March Library is a modern, purpose-built facility and whilst included within the site boundary, would likely remain as part of any site redevelopment.

The northern boundary of the site for the purposes of this assessment comprises the George Campbell Leisure Centre and adjacent public library building. To the north of these buildings the River Nene, which flows through the centre of March, forms a physical constraint to further development in this direction. The eastern boundary comprises a number of under-used retail and industrial premises in the vicinity of Acre Road, and to the rear of retail premises fronting High Street. To the south and west, City Road and The Brewin Chase form natural boundaries to the site. Any numbers in brackets below refer to the corresponding photograph numbers.

Summary of Uses on Site

The majority of the site is currently in use as surface car parking:

i. A large car park west of City Road (approx 200 spaces);
ii. A smaller car park east of City Road (approx 40 spaces) (5); and
iii. A small car park to the immediate south of the leisure centre, which is intended for patrons of the leisure centre and library only (2).

In total, it is estimated there are approximately 260 car parking spaces on the site at present. At the time of our site visits in March 2009, the car parks appeared well supported, with approximately a 75 per cent occupancy rate.

At the centre of the site, between the City Road car parks and the leisure centre car park, is an electricity sub-station (3), flanked by a number of mature trees. This currently presents an obstacle to movement around the site, and would likely need to be retained as part of any site redevelopment. Close to the sub-station is a radio mast, which appears to be privately owned.

The George Campbell Leisure Centre (1) appears functional, if small and slightly outdated, at least from the outside. Access to the leisure centre can be reached either from the High Street or The Brewin Chase (by car). Adjacent to the leisure centre is the town's public library (14), which is housed in a modern building. The library appeared popular and well used when we visited.

To the south-east of the library, and to the rear of retail outlets on High Street, is a public house (13) and a number of small-scale retail operations (12) which appear to work out of converted residential premises. These units spill out onto Acre Road and offer a range of goods akin to a flea market; mostly second-hand bric-a-brac items. A small number of the properties appear vacant. A large warehouse building (11), accessed from Acre Road, is also in this area. The building sits immediately adjacent to the properties on High Street, and therefore it is not possible to access the car parking to the south of the site from Acre Road. The building is in a poor state of repair, and appears to be under-used, with much of it in use as a car valet operation.

Also towards the centre of the site is an operation run by Connexions called Young Persons March (8), which appears to be an educational/ training facility and has adjacent outdoor tarmacced pitch space. This building appears relatively modern and well-used, and is in a good state of repair.

Access through the site is complicated and fragmented. The existing pedestrian routes are narrow and unlit/poorly lit (see 8, for example).

Sequential Location of Site

The site is clearly well located geographically in relation to the town centre core – the northern parts of the site (Library/Acre Road) are approximately two minutes' walk from Broad Street. The Local Plan-defined primary shopping frontage stretches along High Street as far as the Somerfield store, and therefore the majority of the site sits immediately to the rear of the primary retail area. The entire site falls within the defined 'Central Commercial Area'.

However there is likely to be little ready scope for integration with the main High Street shopping frontage – access to the site is presently via three narrow pedestrian routes from High Street (adjacent to the River Nene bridge at the very north of the site; Acre Road; and an access road to the south of Somerfield) – therefore the 'opening out' of any development onto High Street could be complex and may necessitate the removal of existing buildings, which are relatively old properties, and in active use in most instances. Apart from the Library (14) and Greene King public house (13) the site does not appear to contain any buildings of significant architectural merit.

APPENDIX SIX

Case Studies of Town Centre Redevelopment Schemes

Selected Case Studies of Town Centre Redevelopment Schemes

Below, we provide details of various town centre development schemes which are comparable to, and act as case study examples for, the potential retail-led development at Acre Road in March town centre.

The case studies were selected on the basis of their similarity to a potential scheme at March, either in terms of the characteristics of the development site; the location of the development (i.e. on the fringes of the primary retail area or edge of the town centre); the size of the scheme; the type of centre; or size/status of the centre (in terms of its position in the UK retail rankings[1]). The case study centres – together with their current retail ranking and the resident population of the town – are listed in the table below.

The Case Study Centres

Centre	MHE Shopping Index 2008 – Rank (March = 779th)	MHE Shopping Index 2008 - Centre Categorisation (March = 'Minor District')
East Dereham	669	Minor District
Kenilworth	896	Minor District
Droitwich Spa	669	Minor District
Kidlington	985	Minor District
Wantage	1,325	Local
Goole	553	District
Selby	393	District
Gainsborough	381	District
Lichfield	249	Major District
Glossop	629	Minor District
Borehamwood	779	Minor District

All of the case study schemes have either been completed or are substantially underway, and highlight the potential commercial success of retail development schemes in broadly comparable towns.

East Dereham

Over a period of time, Breckland Council acquired the ownership of a 5 acre site (consisting of underused backland) on the edge of East Dereham town centre. The Council appointed consultants to advise on delivery of a town centre scheme, following which Dencora Estates was selected as preferred developer in 2002 for a £16 million scheme incorporating approximately 100,000 sq.ft of retail. The scheme – which comprised two large retail units, as well as 12 smaller units and a leisure facility - opened in 2005.

[1] The exception is Wantage, which ranks significantly below Mold in the MHE Shopping Index and is categorised as a 'local' centre.

Kenilworth

Cobalt Estates (Kenilworth) Ltd, in joint venture with Discovery Properties, acquired Talisman Square shopping centre in Kenilworth, Warwickshire in March 2003. Talisman Square is a classic 1960s style development at the heart of the town centre of Kenilworth.

Since then Discovery Properties has been working to improve the shopping centre and a planning application was submitted in December 2005, for a 30,000 sq.ft extension to the shopping centre and development of an adjoining supermarket. Waitrose has been secured as tenant for the foodstore, which will have a gross floorspace of 43,000 sq.ft.

Planning permission was granted in April 2006 and work on Talisman Square began early in 2007; the new Waitrose store opened in August 2008, signifying the completion of Phase I of the scheme. Work has subsequently commenced on Phase II, which involved demolition of existing outmoded retail units to be replaced with new, larger units, including an extension to the town's Boots store.

Droitwich Spa

Droitwich, an historic spa town famous for its salt deposits, will soon benefit from an expanded town centre. Plans to extend Droitwich's Salters Shopping Centre were approved in 2005. Kandahar Ltd completed two new retail units in August 2006, which are now occupied by Argos and Carphone Warehouse.

Construction on phase two of the scheme - which will provide further retail units, restaurants, a health club and residential units – began at the beginning of 2007 and will add a further 34,122 sq.ft to the centre.

Kidlington

Plans for the redevelopment of a former market site on Kidlington High Street were approved in 2004. The scheme consists of 22 flats with retail units at ground floor level. The development, undertaken by Minns Estates and known as the Hampden Building, was completed in 2005.

Wantage

A major redevelopment of Sainsbury's Limborough Road site in the town - by the Vale of White Horse District Council in partnership with Master Property Trading - began in October 2005, along with work on a petrol station, five large shops and a parade of seven smaller shops, linking to the town's Market Square. The scheme was completed in 2007.

Goole

S Harrison Developments completed a 70,000 sq.ft extension to Goole town centre in 2002, known as Wesley Square. The town improved its position in the MHE *UK Shopping Index* from 559th (1998-99 MHE Index) to 452nd (2003-04 MHE Index) as a result. The development is owned by Threadneedle Investment, and was completed in partnership with the local council. The Wesley Square development also made provision for 280 car parking spaces and a town centre link road. Retailers attracted to the extension include Argos, New Look, Select (ladies fashion), Boots, Clinton Cards and H Samuel.

Selby

Dransfield Properties has secured planning permission for a £16m, 28,000 sq.ft extension of the Market Cross shopping centre in Selby town centre. The extension to the retail offer is designed to reduce trade leakage to higher order surrounding centres and attract new national retailers to the town. The scheme will also include an extension to the existing Morrisons supermarket adjacent to the town centre, and a new 436-space car park. Details on confirmed retailers are relatively limited at present, but fashion retailer New Look has already committed to the scheme by taking a 11,000 sq.ft unit, five times the size of their existing store in the town.

Lichfield

Although a town significantly higher placed in the national retail rankings (249th in MHE's 2008 Index), the £2.1m extension to the town's Three Spires Shopping Centre, owned by St Martin's Property Group, is salient as a relatively small-scale extension to the town's retail offer which has successfully attracted new retailers to the town. The extension provided 25,000 sq.ft of new retail floorspace and 6,000 sq.ft of storage space, and attracted retailers including Marks & Spencer (Simply Food), Sony Centre, Bon Marche and Bodycare.

Glossop

An extension to the retail offer on the edge of Glossop town centre, Derbyshire, called Wren Nest, was completed in 2005. The scheme is formed of three components – a new terrace of retail units, which have been let to retailers Next, Argos, Brantano and M&Co; a family pub operated by Whitbread; and a converted mill, the ground floor of which offers larger retail units occupied by Pets at Home, Halfords and Carpetright, with upper floors given over to residential uses. The development is opposite a 24-hour Tesco store and indications are that it has traded successfully since opening. Wren Nest offers approximately 90,000 sq.ft of retail floorspace, and is owned by Allied Dunbar Insurance and Threadneedle Fund Management.

The scheme has formed a key component of the 'Glossop Vision Regeneration Programme', which in total levied £2.9m of investment into the town centre. Investment in the town centre is set to continue, as Tesco is keen to redevelop its existing store to provide better connectivity with the rest of the town centre.

Borehamwood

Borehamwood is ranked equal to March at 779th in the MHE *UK Shopping Index,* and has seen a significant upgrading in its retail offer in recent years through improvements to the Borehamwood Shopping Park, which sits to the rear of the town centre's prime retail offer and has been redeveloped to form an extension to this. Borehamwood Shopping Park opened as a standalone retail park in 1988, and was formerly known as the Boulevard 25 Retail Park. The Park comprises a total of 211,800 sq.ft of retail space, which is of a greater scale than could be accommodated through the redevelopment of Acre Road in March; nevertheless the nature of the scheme allows for useful comparisons.

In recent years the owner of the Park (sold by the Hercules Unit Trust for £80.6m in 2008) has managed the phased departure of 'bulky goods' retailers from the Park such as Focus, Allied Carpets and Tempo (electricals) and refreshed and reconfigured the units in the Park to attract new 'high street' retailers including Next, Boots, Sports World, WH Smith, Laura Ashley, Clarks, The Body Shop, Costa and Starbucks, as well as securing an increased presence from Marks & Spencer in the town. The Shopping Park is easily connected to the prime shopping area, and thus now operates as an extension of this retail offer.

Gainsborough

Gainsborough is a slightly larger centre than March in terms of its retail offer and function (it presently ranks 381st and is classed as a District Centre), but the extension of the town centre with the Marshall's Yard development is evidence of the effect a successful scheme can have: the current ranking of 381st is a significant improvement on the positioning of the town in the preceding 2003-04 MHE Index, when it was ranked 491st. The £39m Marshall's Yard scheme, owned by Dransfield Properties, opened in 2007 on the site of a former engineering works and offers 225,000 sq.ft of retail floorspace. Tenants include Marks & Spencer (Simply Food), Next, Laura Ashley, The Body Shop, and restaurant chain Prezzo. The development won the British Council of Shopping Centres Gold Award for 'In Town Retail Schemes' in December 2007. Much of the scheme involves the re-use of the former industrial buildings on the site.