
RETAIL ASSESSMENT

GREAT HADDON URBAN EXPANSION AREA

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King Sturge LLP
30 Warwick Street
London W1B 5NH

T +44 (0)20 7493 4933
F +44 (0)20 7087 5555

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1 INTRODUCTION

- 1.1 This report has been prepared on behalf of the Great Haddon Consortium who are seeking planning permission for the development of the Great Haddon Urban Expansion Area.
- 1.2 The site is situated to the south of Peterborough and will contain up to 5,350 dwellings. For the retail element, the proposals include a new district centre which will contain a supermarket, other shops as well as a range of uses that fall into use classes A2, A3, A4 and A5. It will be located at the heart of the residential area and sit alongside other commercial uses and social infrastructure.
- 1.3 In addition, there will also be two neighbourhood centres. The first to come forward will be on the southern gateway of the site located close to the A15 London Road. The second is to be located towards the northwest corner of the site. The neighbourhood centres will serve the day-to-day shopping needs of a walk-in catchment area.
- 1.4 The focus of this report is to demonstrate that there is both a quantitative and qualitative need for the proposed retail floorspace and assess the implications of the proposed district centre and two neighbourhood centres.

Structure of Report

- 1.5 The application site is discussed in greater detail in Section 2 and describes the current role of the main centres in the area and outlines the main convenience retail provision currently available.
- 1.6 Section 3 discusses the proposal and sets out the basic premise of the development.
- 1.7 Section 4 considers the planning policies at a national, regional and local level. This section also considers the need for and purpose of a Retail Impact Assessment, the Sequential Approach and Need Assessments. It also sets out the retail hierarchy within the Borough.
- 1.8 PPS6 requires that all applications for retail development over 2,500 square metres gross floorspace should be supported by evidence of their likely economic impact on existing centres. These aspects are addressed in Sections 5, 6, 7 and 8 which consider the quantitative Retail Impact Assessment, Sequential Test and impact.
- 1.9 The purpose of and need for town centre health checks is addressed in Appendix 4.
- 1.10 A summary and conclusion is provided within Section 9.

2 SITE DESCRIPTION AND CONTEXT

Site Description

- 2.1 Great Haddon (see Appendix 1) lies within the Peterborough district. In geographic terms it lies to the south of the city and is bounded more or less by Hampton to the north east, the A15 London Road to the east, the A1(M) to the west and A1139 Fletton Parkway to the north.
- 2.2 Adjacent to the Great Haddon is the western neighbourhood of Hampton Vale which is currently under construction.
- 2.3 To the east beyond the A15 London Road is the settlement of Yaxley. Beyond Yaxley, the A15 heads to the north with Hampton Hargate, Hampton Vale and Hampton Centre on its left and the planned but yet to be constructed neighbourhood of Hampton Leys on its right.

Wider Retail Context

- 2.4 Peterborough is a centre of regional significance while, Bretton, Hampton, Millfield, Orton and Werrington are identified by Peterborough City Council as District Centres.
- 2.5 Peterborough is the primary shopping destination for comparison goods in the area and, to a lesser extent, for convenience goods.
- 2.6 Peterborough's modern road network offers excellent accessibility by car and many centres have extensive car parking which is often free. Given that the vast majority of shopping trips are undertaken by car and the road network generally offers convenient travel, shoppers have several large supermarkets to choose from.
- 2.7 The three areas (Queensgate, the market and the Rivergate Centre) which make up Peterborough's retail and leisure provision provide a range of town centre uses. Its convenience offer includes a large Asda (3,665 square metres net) at the Rivergate, a Waitrose (1,459 square metres net) and a Tesco Metro (2,267 square metres net).
- 2.8 Peterborough's strength lies with its strong comparison offer and attracts shoppers from Peterborough and beyond. This reflects its sub-regional role and catchment area.
- 2.9 Hampton District Centre is located a short distance to the north of Great Haddon and has the appearance and function of a retail park with most people arriving by car and making use of the significant amount of free car parking. Accordingly, it is car orientated and offers a poor pedestrian environment.
- 2.10 Hampton is anchored by a very large Tesco Extra (9,048 square metres net) which makes up its total convenience offer. The store also contains an optician, pharmacy, a large selection of clothing, home electricals and media. Hampton is also strengthened by its significant fashion offer. Accordingly, Hampton has a very strong influence on

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the retail environment in southern Peterborough and therefore it is expected that it will have an influence on Great Haddon.

- 2.11 Orton District Centre lies to the north of Great Haddon beyond the A1139. It is currently being redeveloped but is nearing completion with a new Co-op supermarket occupying one of the larger new units. The Co-op (1,248 square metres net) anchors the expanded centre.
- 2.12 In addition to the offer in the District Centres, Peterborough also has several out of centre stores. Of potential relevance to Great Haddon is the Aldi on Whittlesey Road (745 square metres net) and the Sainsbury's on Oxney Road (3,360 square metres net).
- 2.13 A short distance to the east of Great Haddon is the settlement of Yaxley. It has two main shopping areas – the main local centre at Yaxley Shopping Centre and the other on Main Street. Together these cater for the day-to-day convenience and services needs of local residents. In addition to these there is also the relatively new out-of-centre Co-op Rainbow foodstore (1,000 square metres net) which provides a limited main food offer for the surrounding recently developed housing estate. The Yaxley Shopping Centre is set around Maltings Square and contains several convenience stores including a good sized Spar (400 square metres net) which appears popular and would meet local top-up needs. However, the centre as a whole is rundown and is in need of refurbishment.
- 2.14 Also of relevance is Sawtry and Stilton. Sawtry is approximately 10 miles to the south of Great Haddon and is a local centre which caters for the top-up convenience and day-to-day services needs of local residents. It appears reasonably healthy with the small Co-op on Green End Road in particular appearing to trade well.
- 2.15 The village of Stilton has a limited offer with a small general store providing a range of basic staples. The village also has a Post Office.
- 2.16 Overall, the convenience offer of these centres caters for very limited 'top-up' trips and are likely to continue to do so regardless of whatever is delivered at Great Haddon or elsewhere.

3 PROPOSAL

- 3.1 Situated to the south of Peterborough, Great Haddon will contain up to 5,350 dwellings and will include a district centre that will contain a supermarket as well as a number of other smaller shops. In addition to a district centre there will be two neighbourhood centres.
- 3.2 The district centre would provide for the day-to-day needs of the community with the main retail focus being a foodstore. Other smaller scale retail facilities will be provided in the two neighbourhood centres which will cater for the immediate needs of their local catchment areas defined by walking distance and passing trade. The neighbourhood centres would primarily cater for top-up food shopping and other local needs such as newsagents, off-licence, hot food takeaways, café etc.
- 3.3 It is considered appropriate that retail floorspace requirements are aligned with Peterborough’s planned housing growth. To be successful in planning terms, the retail offer in the proposed district centre must have sufficient critical mass and be of an appropriate mix to meet the needs and expectations of the future community. If the retail provision is insufficient and cannot compete with the retail offer elsewhere then it will fail as a vital and viable centre to the detriment of the local community.
- 3.4 With this in mind, it is considered ideal to deliver the foodstore, the key retail element of the district centre, as early as is practical within Great Haddon’s development in order to meet local needs and establish sustainable patterns of activity. As Great Haddon is developed the district centre will be improved through the addition of other shops, services and social infrastructure. Towards the latter end of Great Haddon’s development the two neighbourhood centres will be introduced.
- 3.5 Table A below provides a breakdown of proposed floorspace and the type of uses proposed for the district centre and the neighbourhood centres.

Table A: Proposed Floorspace in Net Square Metres (70/30 split).

Centre	Uses	Suggested Floorspace (square metres net)			Total
		Convenience A1	Comparison A1	Other A1 – A5	
District Centre	Supermarket, butcher, baker, fishmonger, greengrocer, pet store, clothing store, hardware shop, chemist, electrical shop, bicycle shop, off- licence, newsagent, hairdressers, dry cleaners, hot food takeaway, café, restaurant, pub/bar, estate agents, bank...	3,000 (foodstore)*	1,230 (foodstore)*		4,230 (foodstore)*
		500	250	2,000	2,750

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Centre	Uses	Suggested Floorspace (square metres net)			Total
		Convenience A1	Comparison A1	Other A1 – A5	
Neighbourhood Centre x 2	Small convenience food store to meet 'top-up' shopping requirements, off-licence, butcher, chemist, baker, café, hot food takeaway, dry cleaner...	1,100 each (of which the top-up shops comprise 600 each)	70 each	600 each	1,770 each 3,540 total
Total		5,700	1,620	3,200	10,520

* For supermarkets sales area comprises serving counters and the area behind used by serving staff, concessions and checkouts (includes space between checkout and front of store i.e. where customers walk when leaving checkout). It excludes: the lobby, customer services, customer toilets and coffee shop (if proposed).

- 3.6 By way of a comparison, the proposed foodstore (4,230 square metres net / 6,043 square metres gross) will be significantly smaller than the Tesco at Hampton which has a net sales floorspace of 9,048 square metres.

4 POLICY BACKGROUND

4.1 A detailed assessment of planning policy has already been set out in the Planning Statement. The commentary below therefore focuses on the key policy issues that are relevant to the retail element of the proposed development at Great Haddon.

4.2 Beginning with an analysis of national policy, this chapter will then go on to review regional and finally the local planning policy that has a bearing on the proposed retail aspect of the development.

National Policy

PPS1: Delivering Sustainable Development

4.3 PPS1: Delivering Sustainable Development sets out the general aims of the planning system. It places sustainable development as the core principle at the heart of the development process.

4.4 It identifies the key role planning plays in the creation of sustainable communities where the need to travel is reduced and stresses that new developments should be able to adapt and evolve so that they stand the test of time.

4.5 Working towards the goal of sustainable communities, PPS1 stresses that developments should strive to meet social, environmental and economic objectives in an integrated manner.

4.6 In particular, paragraph 23 states that LPAs should recognise that economic development can deliver environmental and social benefits and should therefore ensure that suitable locations are available for development. Paragraph 24 reiterates that if properly planned, economic development can have positive social and environmental benefits.

PPG4: Industrial, Commercial Development and Small Firms

4.7 One of the key goals of PPG4 is to encourage continued economic growth in a way that is compatible with its stated environmental objections. It stresses that economic growth and a high quality environment have to be pursued together.

PPS6: Planning for Town Centres

4.8 PPS6: Planning for Town Centres provides guidance on the location of town centre uses. Reinforcing the objectives outlined in PPS1, sustainability is also a key consideration within PPS6. It emphasises that planning for town centres should focus on providing a wide range of services that are accessible to all by a range of different transport options and not only by private vehicles.

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- 4.9 Explained in greater detail in paragraph 1.3, the Government's primary objective in PPS6 can be summarised as a desire to promote, develop and enhance the vitality and viability of existing and new town centres.
- 4.10 In selecting sites for development, local planning authorities should:
- Assess the need for development;
 - Identify the appropriate scale of development;
 - Apply the sequential approach to site selection;
 - Assess the impact of development on existing centres; and
 - Ensure that locations are accessible and well served by a choice of means of transport.
- 4.11 The assessment of need for new floorspace includes existing centres as well as new centres. While the assessment of need is often carried out as part of the development plan preparation process, similar considerations apply to the planning application process.
- 4.12 The guidance requires a quantitative assessment of the need for additional retail floorspace for retail development. In assessing quantitative need regard should be had to:
- Existing and forecast population;
 - Forecast expenditure on specific classes of goods; and
 - Forecast improvements in the productivity of the use of floorspace.
- 4.13 The guidance also stresses that qualitative need should be assessed based on several criteria including enhancing consumer choice, improving accessibility thereby ensuring that existing or new development is, or will be, accessible and well-served by a choice of means of transport.
- 4.14 Paragraph 2.41 proposes that where development opportunities are identified, these should relate to the role and function of the centre and its catchment area. Accordingly, uses that attract a large number of people should be located within centres that serve a similar catchment.
- 4.15 Paragraph 3.10 notes that the catchment area used to assess need should be realistic and well related to the size and function of the proposed development and take account of competing centres.
- 4.16 Guidance in paragraphs 2.53 and 2.54 deal specifically with the designation of new centres and state that this should be done through the plan-making process. It reiterates that a need should be established, such as in areas of significant growth or where deficiencies exist. One of the key aspects that should be considered is how the proposed centre would function and complement the existing network of centres.
- 4.17 As part of this process it is necessary to assess where deficiencies exist in the provision of local convenience shopping and other facilities which serve people's day-to-day needs and identify opportunities to remedy any deficiencies.

4.18 In assessing impact, the guidance recognises that impact can be both positive and negative. Positive benefits are likely to be the strongest where new development takes place in a way that promotes opportunities for linked trips.

4.19 In assessing any potential impact regard should be had to the following:

- The risk to the spatial strategy and the network of existing centres;
- Public and private sector investment;
- The vitality and viability of existing centres within the catchment area;
- Changes in the range of services provided by centres;
- Impact on the number of vacant properties;
- Changes in the attractiveness of the physical conditions of centres; and
- Implications of proposed leisure and entertainment uses on the evening and night time economy.

PPG13: Transport

4.20 Guidance contained within PPG13 aims to ensure that development proposals bring together land use planning with transport.

4.21 The primary aims and objectives of PPG13 can be summarised as the desire to:

- Promote sustainable transport choices;
- Promote accessibility for all; and
- Reduce the need to travel – especially by car.

4.22 As part of this, paragraphs 35 and 36 state that the preferred option should be development at town centre sites, followed by edge-of-centre and, only then, out-of-centre sites in locations which are – or will be – well-served by public transport.

Draft PPS4: Planning for Prosperous Economies

4.23 In April 2009 the Government published Draft PPS4: Planning for Prosperous Economies (Draft PPS4). The document is currently out for consultation and once adopted, its final form will replace PPG4: Industrial, Commercial Development and Small Firms, PPG5: Simplified Planning Zones, PPS6: Planning for Town Centres and the economic development aspects of PPS7 Sustainable Development in Rural Areas.

4.24 This document is designed to streamline planning guidance and avoid repetition. It has considered earlier consultation documents on the new draft PPS4: Planning for Sustainable Economic Development in December 2007 and Proposed Changes to PPS6 in July 2008. The consultation responses have been fed into the Draft PPS4.

4.25 The aim of Draft PPS4 is to provide concise and coherent planning guidance that has the flexibility to adapt and deliver in the changing economic climate.

- 4.26 Key changes proposed in Draft PPS4 include a greater emphasis on support for planning policies that will deliver economic growth. Of relevance to the retail elements of the proposal are the proposed changes to policies that relate to planning for town centres and retail development that are currently contained within PPS6.

Proposed Changes to Planning for Town Centres

- 4.27 In July 2008 the Government published the consultation paper Proposed Changes to Planning for Town Centres. These consultation responses have informed Draft PPS4: Planning for Prosperous Economies published in April 2009.
- 4.28 The proposed revisions follow the Government's commitment to review the current approach to assessing the impact of proposals outside town centres in a way which maintains a strong focus on its town centre first policy. The Government is also committed to promoting competition and improving customer choice.
- 4.29 As discussed above, recommendations within this consultation document will eventually be incorporated within PPS4: Planning for Prosperous Communities which will supersede PPS6 (as well as the other documents as outlined above).
- 4.30 There are no proposed changes for the requirement for planning authorities to assess the need for new town centre development or to take account of scale, impact and accessibility considerations.
- 4.31 The main changes relate to how planning applications for retail development should be considered and tested. The changes propose to remove the current needs test and replace these with a new wider impact test.
- 4.32 The document also has a broader focus with an increased emphasis on economic, social and environmental impacts as well as strategic planning impacts that enables both positive and negative impacts to be considered. It also places greater emphasis on the wider effects of retail development on issues such as employment and regeneration among other things.

Regional Policy

The East of England Plan (May 2008)

- 4.33 In May 2008 the Secretary of State published the East of England Plan which sets out the regional planning policy for the region.
- 4.34 It covers the period until 2021 but also sets out the goals and visions for the longer term beyond this date. In particular it stresses a need to reduce the region's impact on and exposure to, the effects of climate change. To this end, the East of England Plan seeks to put in place a development strategy that supports sustainable growth and reconciles growth with protection of the environment.
- 4.35 It identifies Peterborough as part of the London-Stansted-Cambridge-Peterborough Strategic Growth Area. These Growth Areas are where the most significant development and regeneration challenges in the region have been identified.
- 4.36 Policy E5 (Regional Structure of Town Centres) identifies Peterborough as a Regional Centre and states that major new retail development and complementary town centre uses should primarily be located in the named Regional and Major Town Centres and be consistent in scale with the size and character of the centre and its role in the regional structure.

Local Policy

Peterborough Local Plan: First Replacement (July 2005)

- 4.37 The Peterborough Local Plan was adopted in July 2005 and is the principal document against which planning applications are judged.
- 4.38 Retail issues for the region are covered in Chapter 5 which sets out the retail hierarchy for the region. After Peterborough City Centre which sits at the top of the hierarchy there are five District Centres: Bretton, Orton, Werrington, Millfield and Hampton. Beneath these there are a number of Local Centres.
- 4.39 In line with the 'town centre first' policy highlighted in PPS6, the Local Plan states that the City Centre is and will remain the primary retail destination. A sequential approach is then to be adopted for all new retail development so that it is concentrated first in the City Centre and then District and Local Centres.
- 4.40 Where there is a demonstrable need for new retail development which cannot be accommodated within a centre, this should be in a location that is highly accessible by a choice of means transport where there is the potential for one journey to serve more than one purpose.
- 4.41 Any development that is likely to cause harm to the vitality and viability of existing or planned centres will be resisted.

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- 4.42 Among other things, the aim of the Local Plan's retail strategy is to ensure that residential areas, including new housing developments, have good access to local shopping facilities.
- 4.43 Policy R1 addresses Retail Development within District and Local Centres. It states that the key considerations for assessing appropriate scale and nature of the development will be the size of the centre, the extent of the catchment area and the function of the centre in meeting shopping needs within its catchment.
- 4.44 Policy R1 also identifies that Hampton currently draws significant trade from throughout the City and is operating at a level well above that necessary to meet the day-to-day needs of its current residents alone.
- 4.45 Policy R2 deals with Local Shops in New Residential and Mixed-Use Areas. It states that planning permission will be granted for new shops and Local Centres which form part of new residential and mixed use areas provided that:
- The nature and scale of the retail development would be commensurate with its function to provide facilities for the local residential population; and
 - The development would not adversely affect the vitality and viability of any existing or planned retail centre; and
 - The retail provision would be constructed in phase with the remainder of the development.
- 4.46 It goes on to state that permission will not be granted for large residential or mixed-use developments which are not adequately served by existing shops unless appropriate new retail provision is made as part of the development.
- 4.47 Furthermore, Policy R2 states that new housing development which is not served by existing local shops or which is of a size whose retail needs cannot be met by current levels of provision will be required to include land for appropriate new retail floorspace. The provision of well designed mixed-use developments, including elements of housing, retail and other suitable uses, will be favoured.
- 4.48 In determining the appropriate size and scale, Policy R2 states that the provision of local shops should be of a scale sufficient to meet local convenience shopping needs but not of a size considerably in excess of these needs. Such retail centres should not attract customers from the catchment extending significantly beyond the local area or have detrimental impact on any existing or planned centre.
- Peterborough Local Development Framework (LDF) Core Strategy Preferred Options (May 2008)***
- 4.49 Like many local authorities, Peterborough City Council is in the process of preparing its Local Development Framework (LDF). Its earliest components are not set to be adopted any earlier than 2010. Nevertheless, it provides an indication of how Peterborough City Council is likely to view planning applications in the future.

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- 4.50 The Core Strategy – which is at the Preferred Options stage – identifies the spatial strategy and, once adopted, will become the principal document against which planning applications will be assessed.
- 4.51 The Core Strategy sets out 28 objectives. Relating to retail, objective OB18 Mixed Use Development promotes developments with walkable neighbourhoods that ensure easy access between housing, retail, employment, and community facilities.
- 4.52 Preferred Option CS13 relates to retail and states that the strategy for retail development will be applied in accordance with national guidance contained within PPS6.
- 4.53 CS13 also states that new retail development will be encouraged to maintain and enhance the vitality and viability of centres, with a requirement that the nature and scale of any retail development should be appropriate to the role and function of the centre in which it would be situated.
- 4.54 Relating to the provision of new convenience goods floorspace, CS13 states that no provision will be made for substantial growth before 2011. After this date, provision will be made to meet the forecast capacity of approximately 4,600 to 5,400 square metres gross additional convenience goods floorspace by 2016, rising to 9,600 to 11,600 square metres gross floorspace by 2021.
- 4.55 It identifies Great Haddon as one of the priority areas for the provision of new or additional convenience goods floorspace.
- 4.56 This approach is in line with national policy outlined in PPS6 and regional policy expressed in the East of England Plan as already discussed above.

Summary

- 4.57 In summary, from the preceding policy commentary, it is noted that the City Council supports the requirement for a significant amount of retail floorspace at Great Haddon.

5 QUANTITATIVE NEED

- 5.1 As part of the consideration of 'need' for the proposed development an assessment of quantitative need or capacity for additional convenience goods floorspace within the catchment area has been carried out.
- 5.2 To understand and assist in determining quantitative need we have reviewed the available evidence base. This includes the 2009 Peterborough Retail Study prepared by GVA Grimley and the 2005 Huntingdonshire Retail Assessment Study prepared by Roger Tym and Partners (which was updated in 2007).
- 5.3 As a key element of the Great Haddon proposal is for a convenience led foodstore to act as an anchor for other district centre retail and other local facilities, this assessment focuses on convenience goods floorspace. Nonetheless, we have also addressed the need for comparison goods.

GVA Peterborough Retail Study April 2009

- 5.4 Among other things, the Peterborough Retail Study promotes a strategy to provide for localised convenience needs. The study takes a strategic view on retail in Peterborough and its surroundings. It also provides guidance, as part of the plan making process, for accommodating new retail development as part of the urban expansion areas. In doing so, it provides some direction on the appropriate nature and location of convenience retail provision required to service the proposed expansion areas outside the current boundaries of the city – including the Great Haddon Development Area.
- 5.5 The study recognises that convenience shopping is localised and therefore recommends that future floorspace needs should be aligned with the main areas of population growth. To this end, the study specifically suggests that the retail offer proposed at Great Haddon should comprise a district centre anchored by a foodstore which, together with a range of other shops and services, would serve a district wide catchment.
- 5.6 It is understood that this means that Great Haddon should accommodate convenience goods floorspace generated by population growth from both Great Haddon and surrounding catchment (such as the rural areas to the south). Having analysed the Peterborough Retail Study, it is clear that the area immediately south of Peterborough and stretching west towards Warmington and south towards Sawtry is currently underprovided for in retail terms. Consequently, many residents living within this area have limited choice and are forced to travel some distance in order to carry out their convenience shopping. Taking this into consideration, these areas are included within the catchment area.
- 5.7 In addition to the requirement for a district centre at Great Haddon the study also acknowledges the need for local centres which serve 'walk-in' catchments.
- 5.8 In terms of floorspace the Peterborough Retail Study does not provide much guidance, but it does indicate that the new population could support between 1,890

square metres and 3,780 square metres net depending on the type of operator. This quantity of floorspace does not reconcile with the recommendation for a district centre. It is considered that for a district centre to meet its planning objectives in this location it would need to be significantly larger. That said, the Peterborough Retail Study does note that “it would also be possible to clawback trade from other stores which are overtrading, particularly those outside the Peterborough local authority area”. This point is addressed in more detail in the following section of this report.

Catchment Area

- 5.9 The catchment area from which Great Haddon’s retail offer, and in particular the proposed foodstore, is likely to draw its trade is indicated on the accompanying Catchment Area Plan shown at Appendix 2. The catchment area is composed of several postal sectors centred around it.
- 5.10 As noted above, the catchment is defined by the assumption that convenience shopping is and should be a localised activity. Therefore, we have taken into account travel times along the local road system, the suburban and rural road network and existing retail provision. It extends to the north and east to include the part of the more established neighbourhood of Hampton.
- 5.11 In addition, it is clear that spending will also be drawn from the adjacent rural areas to the south and west. A foodstore of the size proposed together with an attractive high street which offers a range of uses and services has a good prospect of attracting rural residents that currently travel further afield to other supermarkets or continue past Great Haddon onto the existing supermarkets in Peterborough further from their homes.

Design Years

- 5.12 For the purposes of the quantitative assessment, we have used a base year of 2009 – the likely year of the planning application being submitted. Given that the scheme is unlikely to be fully implemented before 2021, we consider this an appropriate design year. However, it is anticipated that elements of retail floorspace would be progressively provided to ensure that the prospective residents have access to local shopping facilities to establish sustainable shopping patterns at an early stage. In particular it is anticipated that the foodstore may be open and trading by 2013. In light of this we have also considered the proposal at 2013.

Population Growth

- 5.13 Table 2 of the economic tables (Appendix 3) provides the population for the base year 2009, for 2013 the test year and for 2021 the design year. The resident population is expected to commence substantial growth by 2011. The population will then progressively grow until 2021 – the year that Great Haddon is expected to be fully implemented.

Spending Per Head

- 5.14 Table 3 (Appendix 3) provides information on the level of consumer spending per head in the survey area for convenience goods. This is based on estimates of

expenditure for 2007 obtained from Experian. We have adopted the projected ultra long term expenditure growth rate, which according to Experian Brief 6.1, growth in convenience goods spending will be 0.7% p.a.

Sources of Quantitative Need

5.15 This assessment of quantitative need or capacity assessment provides an indication of the potential for the catchment area to support additional retail floorspace. We intend to show quantitative need or capacity from the following sources:

- Expenditure generated by indigenous population of Great Haddon;
- Growth in available expenditure arising from increased population and/or per capita spending in the wider catchment area;
- Overtrading in existing stores relative to their anticipated company average turnover levels that is sourced from the catchment area;
- Outflow or 'leakage' of spending from the catchment area to stores elsewhere that could be 'clawed' back by a proposal, and
- Inflow from areas outside the catchment area.

Available Spending

5.16 Estimates of total expenditure on convenience goods and comparison goods across the survey area are set out at Table 4 (Appendix 3). This is derived from the figures in Tables 2 and 3 (Appendix 3).

5.17 Table 4 indicates an increase in potential spending on convenience goods from £38.4m in 2009 to £54.5m in 2013 and £82.7m in 2021. For Great Haddon alone spending on convenience goods will increase from £1.8m in 2011, £5.5m in 2013 and £20.8m in 2021.

Table B: Spending Growth

Time Period	Catchment Area	Great Haddon
2009-2013	£14.1m	£5.5m
2013-2021	£30.2m	£15.3m
Total	£44.3m	£20.8m

Great Haddon – Base Capacity

5.18 When looking at Great Haddon in isolation, the £20.8m of spending it would generate when complete would support a significant amount of floorspace. Insofar as the proposed foodstore is concerned, (based on sales density of £11,000 per square metre) £20.8m would support 1,891 square metres of convenience floorspace (clearly, the other convenience shops would have a much lower sales density). This demonstrates that the prospective residents of Great Haddon alone are capable of supporting a substantial foodstore regardless of any spending that would be attracted from other areas.

Spending From The Wider Catchment Area

- 5.19 As the proposed district centre is to include a modern foodstore together with a range of other shops, services and social infrastructure set within an attractive pedestrian environment, we expect that it will attract trade from beyond Great Haddon.
- 5.20 Accordingly, in addition to the spending generated by the prospective residents of Great Haddon, we have also looked at accommodating the spending and associated quantitative need which will arise from resident populations in adjacent neighbourhoods such as Hampton, Yaxley and from the rural areas to the south, east and west.

Total Convenience Goods Need

- 5.21 Having established the baseline need generated by Great Haddon and acknowledged that it should be used to accommodate the retail needs of the wider catchment area we turn to consider the total available spending generated by the catchment area. The next stage therefore is to determine the average turnover levels achieved by the existing floorspace based on the application of market share, company averages and the store's trade draw from the catchment area.
- 5.22 The 2009 Peterborough Retail Study and the Huntingdonshire 2005 Retail Assessment Study were supported by household surveys. We have used these survey results in order to understand the spending patterns of the catchment area. These results have been used to allocate expenditure distribution. Table 5 (Appendix 3) provides the existing expenditure distribution by market share.
- 5.23 Account is then taken of the proportion of each store's turnover that would be derived from the catchment area. For example, it is assumed that the only large store in the catchment area (the Tesco at Serpentine Green) would draw a significant element of its trade from outside the catchment area. This assumption has been quantified and confirmed by the use of the available household survey data and expenditure distribution set out within the 2009 Retail Study. Table 6 (Appendix 3) sets this out together with the existing net convenience floorspace of each store.
- 5.24 For example, based on current trade draw, the Tesco at Serpentine Green currently draws only 30% of its trade from the Great Haddon catchment area. This level of inflow (70%) is not overly surprising given the location of Serpentine Green, its generous amounts of free car parking, high levels of car ownership and that Peterborough is serviced by good road network that does not suffer from significant amounts of congestion.
- 5.25 Table 6 (Appendix 3) also provides the net convenience floorspace of each store and, where relevant, the floorspace of other stores outside the catchment area. The floorspace figures are sourced primarily from the 2009 Peterborough Retail Study. This table also sets out the company averages for each operator. In this case this is determined by using Mintel 2008 company averages. This is applied to the convenience goods floorspace to give the average company turnover for each store.

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- 5.26 For various reasons, such as those outlined above and by reason of the lack of consumer choice within the catchment area, the survey work indicates that outflow amounts to 38% of spending. In other words, there is a relatively high level of leakage of convenience goods from the catchment area with shoppers using stores further afield. These stores include:
- The out-of-centre Sainsbury's at Oxney Road;
 - The out-of-centre Aldi at Wittlesey Road; and
 - The Asda at Rivergate.
- 5.27 Within the catchment area residual spending (2009) equates to **£12.5m**. This is based on the significant amount of leakage to other stores outside the catchment area which amounts to **£14.6m**. By reason of the Tesco Extra at Hampton, in 2009 the floorspace in the catchment area as a whole is undertrading by £2.0m. This is not unsurprising given the vast size (5,429 square metres net convenience) of the Tesco store.
- 5.28 Clearly however, the catchment area cannot claim all this residual spending as much of it is rightly drawn to stores and centres outside the catchment area and would continue to do so regardless of the introduction of a new district centre at Great Haddon or other new centres.
- 5.29 It is recognised that no centre or store trades in isolation. However, successful and sustainable centres should seek to capture a high proportion of local trade and reduce outflow. The capacity of new floorspace is therefore, in part, a factor of what level of trade draw could or should be clawed back.
- 5.30 In view of this, a proportion of leakage would be 'clawed back' with the introduction of new floorspace as part of an attractive new district centre together with two neighbourhood centres. Therefore, the 'clawback' of spending that currently leaves the catchment can be used to support the new floorspace.

Test Years 2009 - 2013

- 5.31 This section looks forward to the test year of 2013. This is to demonstrate the substantial additional growth that will arise between the base year of 2009 and the test year 2013.

Table C: Growth in Spending 2009 – 2013

	Assessment Criteria	Catchment Area £m	Great Haddon £m
A	Available capacity 2009	12.5m	0m
B	Spending 2009	38.4m	0m
C	Forecast spending 2009 - 2013	52.5m	5.5m
D	Growth in spending 2009 - 2013 (C-B)	14.1m	5.5m
E	Total additional Spending (current capacity + growth (A+D))	31.5m	5.5m
F	Commitments (floorspace efficiency), increase of Serpentine Green's Benchmark	Existing Shops 0.2m Serpentine Green 3.7m	Nil
G	Residual (rounded)	22.7m	5.5m

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- 5.32 In 2013 the residual spending for the catchment area totals £22.7m. Of this, the undertrading experienced by the Tesco Extra is expected to be reversed and to overtrade compared to its increased benchmark to reflect an increase in the Hampton population. Overall, spending is forecast to rise to £52.5m, with £19.7m, being spent outside the catchment area. To re-cap, £19.7m represents a 38% outflow of spending. Table 7 (Appendix 3) sets out the above in more detail.
- 5.33 Table 10 (Appendix 3) sets out the implications of the introduction of the district centre foodstore at 2013. This would see the catchment area's market share increase by 11% to 73%. As outlined in Section 3, it is considered appropriate to deliver the foodstore, the key retail element of the district centre, early within Great Haddon's development in order to address local needs and act as an anchor to attract other smaller retailers.
- 5.34 To this end it is anticipated that in 2013 the foodstore will undertrade as the indigenous population is still growing. Nonetheless, the foodstore would provide an important and necessary facility to the growing population and as the local population increases so would its use.

Design Year 2021

- 5.35 The following Table adds to the above calculations, but through to the design year of 2021.

Table D: Growth in Spending 2009 - 2021

	Assessment Criteria	Catchment Area £m	Great Haddon £m
A	Current available capacity 2009	12.5m	0m
B	Current spending 2009	38.4m	0m
C	Forecast spending 2021	82.7m	20.8m
D	Growth in spending 2009 - 2024 (C-B)	44.3m	20.8m
E	Total available Spending (current capacity + growth (A+D))	56.7m	20.8m
F	Commitments (floorspace efficiency), increase of Serpentine Green's Benchmark	Other shops 0.7m Serpentine Green 15.0m	Nil
G	Residual (rounded)	41.0m	20.8m

- 5.36 Based on fixed market shares, in 2021 38% of the spending that is generated in the catchment area will continue to be spent outside it, and therefore surplus capacity would continue to be drawn from the overtrading of existing stores which has grown from negative £2m in 2009 to £10.5m in 2021. This is set out in more detail at Table 12 (Appendix 3).
- 5.37 Table E below sets out the available spending, and in doing so, considers a clawback of market share that is expected to be provided by the proposed development.
- 5.38 As noted above, the Great Haddon scheme proposes a 3,000 square metres of convenience floorspace within the foodstore (the remaining 1,230 square metres being comparison floorspace) together with a range of smaller convenience shops.

Table E: Available Spending allowing for revised market share 2021

	Assessment Criteria	Catchment Area £
A	Benchmark turnover from catchment area	41.1m
B	Turnover of floorspace with catchment area	51.6m
C	Overtrading	10.5m
D	Clawback (16%)	13.2m
E	Inflow	8.3m
F	Potential additional expenditure (C+D+E)	32.0m
G	Trading efficiency	0.7m
H	Total available capacity (F-G)	31.3m

5.39 As a result in the shift in market shares and overtrading, available capacity is £31.3m. Based on a sales density of £11,000 per square metre for the foodstore and a reduced rate for the smaller convenience stores this amount of capacity demonstrates a quantitative need for the vast majority of the proposed convenience floorspace. There is a slight shortfall but this is not unexpected given the vast size and dominance of the Tesco Extra at Serpentine Green. However, it is considered that a store of the size proposed is justified on the grounds of qualitative need. This is addressed in more detail in Section 6 of this Assessment.

5.40 It is anticipated that because of the dominance of the Tesco Extra that the proposed foodstore will probably also undertrade marginally. In some cases this would suggest that the store is oversized. However, as noted above, there are qualitative issues that necessitate a foodstore of the size proposed. This issue is addressed at Section 6.

5.41 As a result of Great Haddon and its retail offer, the catchment area's market share is anticipated to increase from 62% to 78% by 2021. Accordingly, 22% of spending is expected to continue be spent outside the catchment area.

Summary

5.42 The population of Great Haddon alone requires approximately 2,000 square metres of convenience floorspace.

5.43 In order to satisfy the objectives of National Planning Policy it is necessary for the catchment area to retain a greater proportion of available convenience spending to ensure that both existing and future residents are able to shop locally without the need for extended journeys by car.

5.44 In light of the significant scale of development at Great Haddon it is appropriate that it is used to accommodate and address the retail needs of the catchment area. This approach is consistent with PPS6.

5.45 Once complete, the district centre at Great Haddon will offer a high quality shopping environment which will enable it to compete against its nearby oversized neighbour and the several out-of-centre stores that currently draw most of the catchment area's spending.

- 5.46 The potential clawback is based on reducing the £31m (or 38% of the total) outflow from the catchment area. In a city like Peterborough, Great Haddon will always experience some outflow. However, it is considered that a new district centre and two local centres reducing such leakage is appropriate and achievable in light of the proposed scale of the district centre.

Comparison Goods Need

- 5.47 The proposed comparison goods floorspace is limited primarily to an ancillary offer within the proposed supermarket and a few shops at within the district and neighbourhood centres as Peterborough and, to a lesser extent, Hampton are, and will continue to be, the focus of non-food shopping.
- 5.48 As set out in Section 3 of this report, 1,230 square metres (net) of comparison floorspace is proposed as part of the foodstore. Based on a generous sales density of £6,000 per square metre this would generate a turnover of £7.4m. In addition, a further 390 square metres is sought for a range of smaller shops in both the district and neighbourhood centres.
- 5.49 Taking the population at 2013 (the test year) and again utilising the expected spending per head (£3,587) it can be seen that Great Haddon alone would generate £11.8m of comparison goods spending. Based on the same sales density as used above (£6,000) this equates to 1,966 square metres of comparison floorspace.
- 5.50 It is therefore considered that, based on the expected per capita spending, the modest amount of proposed comparison floorspace can be readily accommodated in Great Haddon thus ensuring local needs are met while at the same time ensuring a sustainable pattern of development.

Commercial (A2) Leisure Capacity (A3, A4, A5)

- 5.51 The proposed floorspace for A2 – A5 uses amounts to 3,200 square metres. The proposal provision is of a scale to meet localised needs. This floorspace is to be located in the district and, to a lesser extent, both of the proposed neighbourhood centres.
- 5.52 For food and drink the 2009 Retail Study does not provide any specific guidance. However, based on the anticipated population of Great Haddon of 11,717 and a spending per capita of approximately £1,500 (the spending per head in 2021) this would yield £17.6m in spending. Of this spending it is anticipated that a significant amount would be spent outside Great Haddon, nonetheless it is considered that this spending alone is sufficient to support the proposal quantity of food and drink floorspace.
- 5.53 The proposed uses that fall into the A1 non-retail and A2 use class such as hairdressers, estate agents, building societies and banks are part of the service economy and are to be provided of a scale that will meet the needs of the local population and of course add to the diversity of uses in the proposed centres. It is considered that the planned provision is proportional to the scale of Great Haddon.

6 QUALITATIVE NEED

- 6.1 In 2013 it is expected that the store, if it is open, will be undertrading as Great Haddon's population would still be growing and the supermarket would not yet be accompanied by a complete range of other shops, services and social infrastructure that would increase its attraction. By 2021 it is anticipated that Great Haddon would be fully built and the store would therefore trade close to its benchmark.
- 6.2 Despite the store's early undertrading, it is considered that it is of appropriate scale to meet the required quantitative and qualitative need for Great Haddon and its wider catchment and to this end it accords with the PPS6.
- 6.3 The 2009 Peterborough Retail Study seeks to address qualitative need by aligning convenience good requirements with the planned housing growth. Insofar as Great Haddon is concerned, the proposed retail provision will meet local needs, provide competition and consumer choice.
- 6.4 PPS6 seeks to ensure that people's everyday needs, such as convenience shopping, are met on a localised basis. Furthermore, healthy town centres need to have a critical mass and retail diversity that attracts customers on a regular basis throughout the year. With this in mind, the food offer needs to be of sufficient size in order to meet the needs of its catchment, establish sustainable shopping patterns and dissuade residents from travelling to stores further afield.
- 6.5 The proposed foodstore at the district centre together with the ancillary retail, leisure and service provision will promote consumer choice and competition. To enable the district centre – and especially the foodstore – to be commercially viable with many of the surrounding stores, and in particular Serpentine Green, a quantity of comparison goods floorspace together with a diversity of retail development would also be required.
- 6.6 If the foodstore is not of sufficient size it will fail to hold its own with the nearby Tesco Extra and in turn it will fail to successfully anchor the district centre. An undersized store would become a glorified top-up shop and would not generate the necessary footfall to deliver trade to the other shops and services in the centre.
- 6.7 Therefore, to address qualitative need, the proposed foodstore is of a size that provides a mix and range of goods expected by customers as part of their main food shopping experience.

7 SEQUENTIAL APPROACH

- 7.1 PPS6 requires that when promoting non-central town centre uses it is first necessary to consider the availability of sites in more central locations. The guidance recognises however that both developers and local authorities should be realistic and ensure that alternative sites do not result in a retailer being forced to compromise on the range of goods that can be sold.
- 7.2 Great Haddon comprises a district centre which will be anchored by a foodstore together with a range of smaller retail units including restaurants and a public house and community uses comprising:
- Transport Interchange;
 - Enterprise Hub;
 - Secondary school (dual use with community);
 - Multi-purpose community centre;
 - Health centre;
 - Crèche;
 - Offices; and
 - Leisure facilities;
- 7.3 In addition there will be two neighbourhood centres, both of which will contain a small convenience store and a range of smaller retail units.
- 7.4 As the neighbourhood centres will cater for the shopping and community needs of very localised catchments, it is not considered appropriate to review sites in Peterborough which will serve a much wider catchment area and is the focus of the district's shopping and community facilities.
- 7.5 The total land take of the proposed district centre will extend some 5.76 hectares and when combined with other centrally located community facilities such as schools, a district centre of some 16.1 hectares will be created. This combination of uses could not readily be accommodated within another centre nearby and it would be clearly inappropriate to do so as the elements that make up the district centre are required to serve the daily needs of the new Great Haddon community.
- 7.6 In summary, inline with the recommendations of the 2009 Peterborough Retail Study, the district centre facilities at Great Haddon will cater for the day-to-day shopping requirements and community needs. As such it would be inappropriate to locate facilities that seek to serve a localised catchment area elsewhere.
- 7.7 The sequential test has identified that there is currently only one suitable site for the district centre. The same conclusion is reached with respect to the two neighbourhood centres.
- 7.8 In light of the above it is considered that the sequential approach has been applied and adhered to.

8 IMPACT

- 8.1 The study has adopted 2009 as the base year for this assessment. As Great Haddon is unlikely to be fully implemented before 2021, this has been adopted as the design year. Nevertheless, as noted previously, it is anticipated that the retail components would be provided progressively prior to completion of the scheme. In particular it is anticipated that the foodstore will probably be open and trading in 2013 in order to ensure that residents have access to appropriate levels of shopping facilities. Accordingly, a test year of 2013 has also been considered.
- 8.2 In order to assess the level of trade diversion to Great Haddon it is first necessary to analyse the current turnover of existing stores and centres within the catchment area and also those stores outside the study area that draw spending.
- 8.3 Calculation of the base year (2009) convenience goods turnover of existing stores is derived by allocating available convenience goods expenditure in each postal sector to a foodstore. Spending is allocated on the basis of the shopping patterns sourced from the 2009 Peterborough Retail Study.
- 8.4 The expenditure allocated to each store / centre can be added together across the postal sectors to give the total turnover of that store derived from the catchment area (and outside in some cases). The proportion (%) of a store's turnover derived from outside the catchment area is estimated to give a total turnover (£m) at the base year for each centre/store.
- 8.5 Using this analysis the trade draw of each store can also be calculated. This is the proportion (%) of a store's trade attracted from a particular zone. Adding up the trade draw for each store from the catchment area provides the trade draw. These figures are then linked to the capacity assessment.
- 8.6 An assumption is then made for the percentage of trade draw to an individual store derived from outside the catchment area, i.e. inflow. This is added to the trade draw of the store derived from within the study area to give the total turnover of the store. The resultant turnover levels can then be compared against company averages of these stores to determine whether stores are overtrading (i.e. above company average) or undertrading. Table 5 (Appendix 3) sets out the turnover of the stores based on their current market share.
- 8.7 Account is then taken of changes in store performance between the base year (2009), the design year (2021) and the intervening test year of 2013 by distributing spending growth inline with the market share result (sourced from household surveys). In the convenience goods sector this process simply allocates and distributes spending growth to existing stores in the same proportion as the base year spending, in other words a fixed market share approach.
- 8.8 The final stage is to introduce the proposed development and any commitments into the model and to adjust market shares of the existing stores on the basis that the proposed store is most likely to draw trade from. We have undertaken this analysis on a store by store basis.

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- 8.9 As the district centre will be an attractive high quality shopping environment that includes a modern foodstore, it is likely to attract trade from beyond the development's immediate residential population. Nevertheless, it is anticipated that the store will achieve the greater proportion of its trade from Great Haddon, with only modest proportions being drawn from surrounding residential neighbourhoods or the rural areas to the south, east and west.
- 8.10 For those living outside Great Haddon, it is considered that its retail offer, and in particular that of the district centre, will simply offer an attractive and closer alternative to the stores they currently frequent. For example, many rural residents currently travel past Great Haddon to the Tesco at Hampton.
- 8.11 Table 11 (Appendix 3) provides a summary of the impact of the proposed development at 2013. It shows the turnover of the stores within and outside the catchment area at 2013. It shows how these turnovers would have increased as a result of growth in convenience goods expenditure arising primarily from Great Haddon's and Hampton's population growth from the base year through to 2013. The table also illustrates the turnover of the stores at 2013 after taking into account the scenario comprising the introduction proposed foodstore at the district centre.
- 8.12 The table then provides the total convenience diversion from the catchment area to the proposed foodstore at the design year in monetary terms. The last column expresses this diversion as a percentage impact on the stores turnover prior to the introduction of the proposed store at 2013. It should be noted that these impacts relate to spending from the catchment area and from the population growth in Great Haddon and therefore the actual impact would be significantly less. For example, we estimate that by 2013 the Tesco Extra at Hampton will have a turnover of £73.7m while the total trade diverted is anticipated to amount to £5m or 7%.
- 8.13 By 2021, the attractiveness of the district centre and therefore its anchor would have increased and together with the two neighbourhood centres it is expected to divert some £12.4m of spending from the Tesco Extra. However, between 2013 and 2021 the area as a whole would have a larger population and therefore the Tesco is anticipated to have a turnover of £81.4. A £12.4m trade diversion represents a 15% impact.
- 8.14 With respect to the City Centre offer it is anticipated that Adsa Rivergate will experience the highest diversion of trade. This amounts to only £2.6m and based on an expected turnover at 2021 of £40m, this equates to a 6.5% impact.
- 8.15 Table 16 (Appendix 3) sets out the impact on stores from spending derived within the catchment area for the design year of 2021.
- 8.16 With respect to other centres it is expected that they will continue to trade more or less as they currently do. In particular, to the south of Great Haddon are the villages of Stilton and Sawtry which both contain a small selection of small scale convenience stores. As such, they cater for very limited 'top-up' trips and are likely to continue to do so regardless of whatever is delivered at Great Haddon.

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- 8.17 The same can also be said about Yaxley; the role of the stores located in the settlement are expected to continue more or less as they are with Great Haddon simply offering a closer alternative to the Tesco Extra at Hampton.
- 8.18 In summary, it is considered that the new retailing planned for Great Haddon is of a scale that will primarily serve the needs of the new and existing residents and conforms to the development plan. Therefore it is expected that it will have little impact on the retailing patterns within Peterborough and the surrounding rural areas of Huntingdonshire.

9 SUMMARY AND CONCLUSIONS

- 9.1 This report has considered the retail proposals associated with the urban extension at Great Haddon which is to accommodate up to 5,350 new homes. This report assesses the need for additional convenience floorspace within the proposed development, addresses the sequential test and analyses the potential impacts on surrounding stores and centres.
- 9.2 The proposals will provide a range of community infrastructure and facilities to ensure the delivery of a sustainable mixed use development of sufficient critical mass and diversity to meet the requirements and expectations of the community.
- 9.3 The inclusion of modern food shopping facilities will enable residents to make local shopping trips which reduce the need for car travel.
- 9.4 The location and scale of the proposed retail provision is in keeping with the recommendations of the 2009 Peterborough Retail Study. The Study acknowledges the necessity to address qualitative and quantitative need by aligning retail requirements with the planned housing growth for Peterborough.
- 9.5 An assessment of need has been considered on the basis of this Study. It is not anticipated that Great Haddon will be completed and fully occupied before 2021. Nevertheless, the assessment suggests that it is appropriate to introduce elements of its retail provision earlier than this in order to support the new population.
- 9.6 The proposed retail provision in the form of a district centre and two neighbourhood centres are required to support and address local needs. It is therefore not considered necessary to undertake a sequential assessment to identify sites within Peterborough or one of the other District Centres located in the southern part of the district.
- 9.7 The assessment of impact has allowed for existing retail provision, including out of centre stores, to achieve annual growth in turnover. Even with the implementation of the Foodstore by 2013, it is anticipated that the stores of Hampton, Yaxley and the city centre would be in a position to trade above their company benchmarks. As a result of the significant increase in population in the area, and therefore available spending, the position improves in the later years from 2013 onwards.
- 9.8 This clearly demonstrates that there will be more than sufficient spending within the catchment area to enable existing in-centre stores, and indeed out-of-centre stores, to achieve growth in turnover such that unless new stores are introduced they would significantly overtrade. This suggests that there will be no adverse impact arising from Great Haddon and that there will be a need for further convenience floorspace in this part of Peterborough over the plan period.
- 9.9 It is considered that the centres of Yaxley and Hampton will continue to trade more or less as they currently do.

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- 9.10 Accordingly, it is considered that the proposal is consistent with the adopted and emerging development plan and Planning Policy Statement 6 and will secure a sustainable pattern of development that meets local need without adversely impacting on the existing centres.

APPENDIX 1

APPENDIX 2

Superstores (> 2,500m²)



- Asda**
 1. Asda West Rivergate Shopping Centre, PE1 1ET
Sainsburys
 2. Sainsburys, 112 Oxney Road, PE1 5NG
 3. Sainsburys, Flaxlands Breton Centre, PE3 8DA
Tesco Extra
 4. Tesco Extra, Serpentine Green, PE7 8BD

Supermarkets (1,000m² - 2,500 m²)

- Co-Op**
 5. Orton District Centre, PE2 5UW
LIDL
 6. Westfield Road, Peterborough, PE3 9EE
Morrisons
 7. 54 Bridge Street, Peterborough, PE1 1DU
Morrisons
 8. Lincoln Road, PE4 8WS
Tesco Metro
 9. Hereward Cross, PE1 1TA
Waitrose
 10. Queensgate Centre, PE1 1NR

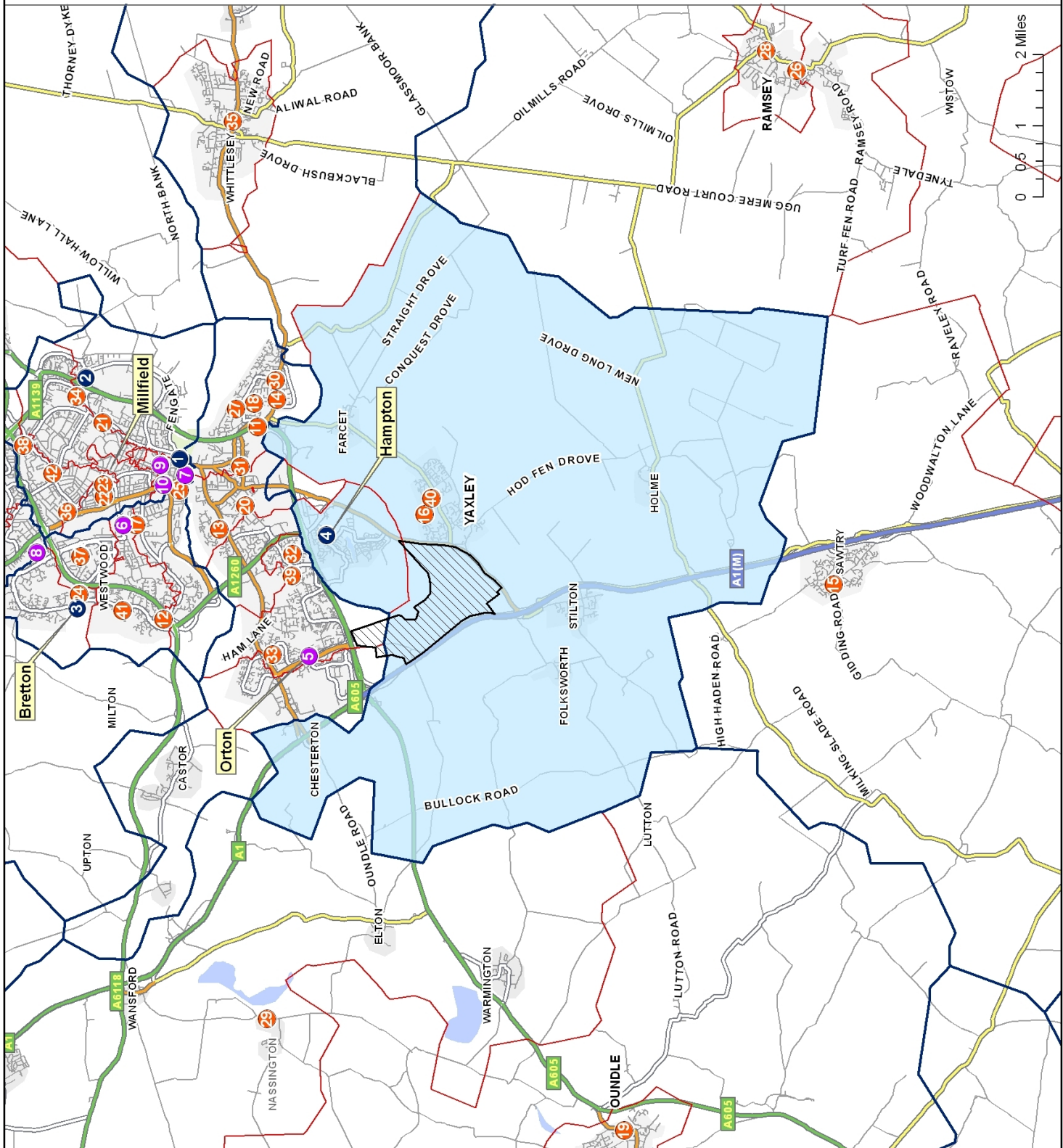
Others (< 1,000m²)

- ALDI**
 11. ALDI, Whittlesey Road, PE2 8SQ
Budgens
 12. 34-35 Copeland Centre, South Breton, PE3 6YJ
 13. Unit D, Valley Park Centre, Sugar Way, PE2 9OB
Co-Op
 14. (Balfour), 115 Central Square, PE2 8RH
 15. 94 Green End Road, Sawley, PE28 5UX
 16. Bentley Avenue, Yaxley, PE7 3ZT
 17. 97-101 Mayors Walk, Peterborough, PE3 6EY
 18. Lawson Avenue, Southfields, Stanground, PE2 8PZ
 19. St Osyth's Lane, Oundle, PE8 4BZ
Costcutter
 20. 109-111 Beisize Avenue, Woodston, PE2 9HZ
 21. 343 Eastfield Road, Peterborough, PE1 4RA
 22. Kingsfisher Filling Stn, 214-228 Lincoln Rd, PE1 2NE
Iceland
 23. 32-246 Lincoln Road, Millfield, PE1 2NE
 24. The Breton Centre, Breton, Peterborough, PE3 9DF
 25. Unit 25 Rivergate Centre, Wiersen Plaza, PE1 1EL
Lands
 26. Burtons Corner, Bury Road, Huntingdon, PE26 1NE
 27. 107 Thistle Drive, Stanground, PE2 8JA
 28. 12 Great Whyte, Ramsey, Huntingdon, PE26 1HA
 29. 49 Station Road, Nassington, PE8 6QB
 30. BP P'borough, Horseway Way, Whittlesey Rd, PE2 8RR
 31. Fletton Stores, 126-128 High St, Fletton, PE2 8DP
 32. Eldem Community Store 2 Eldern, Orton Malborne, PE2 5NH
 33. Orton Superstore, 2-3 Mattley Centre, PE2 5YQ
Somerfield
 34. (Peterborough FC), Paston Parkway, PE1 4SA
 35. 763 Blunts Lane, Whittlesey, PE7 1AW
 36. 232-246 Lincoln Road Off Windmill Street, PE1 3HA
Spar
 37. 10-14 Hampton Court, Peterborough, PE3 7JB
 38. 177-194 Welland Road, Dogsthorpe, PE1 3SY
 39. 27-28 Herlington, Orton Malborne, PE2 5PW
 40. Malling Square, Broadway, Yaxley, PE7 3JU
 41. Tyssdale Centre, Breton Peterborough, PE3 9XZ
Tesco Express
 42. Dogsthorpe Express, Welland Road, PE1 3SA

Site Boundary **District Centre**
 
Catchment Area

King Sturge
Great Haddon Retail Study
Catchment Area Plan
Version 4: July 2009

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APPENDIX 3

STUDY ASSUMPTIONS

Table 1a

Price Levels	2007
Base Year	2009
Test Year	2013
Design Year	2021
Special Forms of Trading*	
Convenience**	3%
Comparison	15.00%
Floorspace Efficiency*	
Convenience	0.25%
Comparison	1.50%
Spending Growth rate*	
Convenience	0.70%
Comparison	4.60%

Notes/Sources

*Experian Retail Planning 6.1 - October 2008, updated January 2009

**SFT for convenience goods adopted inline with 2009 Peterborough Retail Study

PROPOSAL

Table 1b

District Centre

Supermarket

Convenience Floorspace 3000 sq m net

Comparison Floorspace 1230 sq m net

Other Convenience Floorspace 500 sq m net

Other Comparison Floorspace 250 sq m net

Neighbourhood Centres

Convenience Floorspace 1100 sq m net each

Convenience Store 600 sq m net each

Comparison Floorspace 70 sq m net each

CATCHMENT AREA POPULATION

Table 2

Population Estimates														Growth	
	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2009 - 2013	2009-2021
PE7 3	15,672	15,829	15,935	16,071	16,208	16,355	16,514	16,614	16,731	16,945	17,046	17,166	17,247	3.4%	10.0%
PE7 8 Hampton	7,920	8,890	9,860	10,830	11,800	12,770	13,470	17,710	15,680	16,650	17,680	17,685	17,692	49.0%	123.4%
Great Haddon	0	0	1,100	2,200	3,300	4,400	5,500	6,600	7,700	8,800	9,900	10,900	11,717		
Total	23,592	24,719	26,895	29,101	31,308	33,525	35,484	40,924	40,111	42,395	44,626	45,751	46,656	32.7%	97.8%

Notes/Sources:

1. Experian, King Sturge and David Lock & Associates
2. Population for Great Haddon is based 5326 dwellings and on an average household size of 2.2 persons.
3. Population figures adjusted to allow for planned growth in Hampton and Hempstead

CONVENIENCE RETAIL EXPENDITURE PER HEAD (2007 Prices)

Table 3a

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Growth	£1,629	£1,641	£1,652	£1,664	£1,675	£1,687	£1,699	£1,711	£1,723	£1,735	£1,747	£1,759	£1,772

Notes/Sources:

1. Spending per head from Experian Expenditure Data
2. Special Forms of Trading Deducted at 3.0%
3. Assumes annual growth rate of 0.7% Experian Retail Planner Briefing Note 6.1 (Oct 2008 and revised Jan 2009) Table 3.2 Ultra long term trend
4. 2007 price base

COMPARISON RETAIL EXPENDITURE PER HEAD (2007 Prices)

Table 3b

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Growth	£2,997	£3,134	£3,279	£3,429	£3,587	£3,752	£3,925	£4,105	£4,294	£4,492	£4,698	£4,914	£5,140

Notes/Sources:

1. Spending per head from 2009 Peterborough Retail Study - average of zones 2 and 6
2. Special Forms of Trading Deducted at 12.5%.
3. Assumes annual growth rate of 4.6% Experian Retail Planner Briefing Note 6.1 (Oct 2008 and revised Jan 2009) Table 3.2 Ultra long term trend
4. 2007 price base

CONVENIENCE GOODS EXPENDITURE (£)

Table 4a

Expenditure - All Convenience Goods			
	2009	2013	2021
PE7 3	£25,534,797	£27,155,343	£30,554,501
PE7 8 Hampton	£12,904,262	£19,770,055	£31,342,856
Great Haddon	£0	£5,528,914	£20,757,644
Total	£38,439,059	£52,454,312	£82,655,001

Notes/Sources:

1. Table 2a and Table 3a

COMPARISON GOODS EXPENDITURE (£)

Table 4b

Expenditure - All Comparison Goods			
	2009	2013	2021
PE7 3	£46,961,595	£58,139,940	£88,656,828
PE7 8 Hampton	£23,732,506	£42,327,942	£90,944,315
Great Haddon	£0	£11,837,475	£60,230,304
Total	£70,694,100	£112,305,358	£239,831,448

Notes/Sources:

1. Table 2b and Table 3b

EXPENDITURE DISTRIBUTION / MARKET SHARE BY ZONE 2009

Table 5

	PE7 3	PE7 8 Hampton	Great Haddon	Total Trade From Catchment	Inflow	Total T/O
Total Expenditure	£25,534,797	£12,904,262	£0			
Main Food	£19,151,098	£9,678,196	£0			
Top-up	£6,383,699	£3,226,065	£0			
<hr/>						
District Centre Foodstore						
Neighbourhood Centre Supermarkets						
Tesco Extra, Serpentine Green	£11,267,229	£7,436,081	£0	£18,703,310	70%	£62,344,367
Co-op Rainbow, Yaxley	£3,223,768	£1,145,253	£0	£4,369,021	25%	£5,825,362
Other Yaxley Convenience Stores	£510,696	£64,521	£0	£575,217	5%	£605,492
Other	£159,592	£80,652	£0	£240,244	0%	£240,244
<hr/>						
Outside Catchment Area						
Morrisons, Lincoln Road	£383,022	£193,564	£0	£576,586		
Asda, Rivergate	£1,755,517	£693,604	£0	£2,449,121		
Sainsbury's, Bretton	£829,881	£387,128	£0	£1,217,009		
Sainsbury's, Oxney Road	£1,659,762	£838,777	£0	£2,498,539		
Waitrose, Queensgate	£319,185	£161,303	£0	£480,488		
Aldi, Whittlesey Road	£1,085,229	£451,649	£0	£1,536,878		
Co-op, Orton	£574,533	£96,782	£0	£671,315		
Co-op, Sawtry	£95,755	£16,130	£0	£111,886		
Co-op Rainbow, Ramsey	£574,533	£32,261	£0	£606,794		
Tesco, Werrington	£414,940	£193,564	£0	£608,504		
Tesco Metro, Hereward Centre	£478,777	£209,694	£0	£688,472		
Tesco Extra, Northampton	£287,266	£145,173	£0	£432,439		
Tesco, Huntingdon	£191,511	£96,782	£0	£288,293		
Somerfield, Whittlesey	£734,125	£290,346	£0	£1,024,471		
Other	£989,473	£370,998	£0	£1,360,471		
<hr/>						
Totals	£25,534,797	£12,904,262	£0	£38,439,059		

Notes / Sources

1. Peterborough Shopping Household Telephone Survey
2. 2007 Update - Huntingdonshire Retail Assessment
3. Main Food expenditure comprises 75% of total convenience spending

TURNOVER OF EXISTING STORES 2009

Table 6

Existing Estimated Turnover - All Convenience Stores in Study Area

	Convenience sqm net	Sales Density	Benchmark	Estimated Benchmark From Catchment	Current Trade Draw By Market Share	Available Spending £38,439,059
District Centre Foodstore						
Neighbourhood Centre Supermarkets						
Tesco Extra, Serpentine Green	5,429	£12,894	£70,001,526	£21,000,458	£18,703,310	
Co-op Rainbow, Yaxley	800	£6,772	£5,417,600	£4,063,200	£4,369,021	
Other Yaxley Convenience Stores	450	£2,000	£900,000	£855,000	£575,217	
Other					£240,244	
Total For Catchment	6,679		£76,319,126	£25,918,658	£23,887,793	
Morrisons Lincoln Road	2,487	£11,173	£27,787,251		£576,586	
Asda, Rivergate	2,199	£14,352	£31,560,048		£2,449,121	
Sainsbury's, Bretton	2,862	£9,744	£27,887,328		£1,217,009	
Sainsbury's, Oxney Road	2,520	£9,744	£24,554,880		£2,498,539	
Waitrose, Queensgate	1,313	£11,601	£15,232,113		£480,488	
Aldi, Whittlesey Road	679	£3,911	£2,655,569		£1,536,878	
Co-op, Orton	1,123	£6,772	£7,604,956		£671,315	
Co-op, Sawtry	40	£6,772	£270,880		£111,886	
Co-op Rainbow, Ramsey	950	£6,772	£6,433,400		£606,794	
Tesco, Werrington	1,130	£12,894	£14,570,220		£608,504	
Tesco Metro, Hereward Centre	1,813	£12,894	£23,376,822		£688,472	
Tesco Extra, Northampton	3,420	£12,894	£44,097,480		£432,439	
Tesco, Huntingdon	3,100	£12,894	£39,971,400		£288,293	
Somerfield, Whittlesey	525	£6,329	£3,322,725		£1,024,471	
Other					£1,360,471	
Total Outside Catchment					£14,551,266	

Notes/Sources:

1. Floorspace from 2009 Peterborough Retail Study, Huntingdonshire Retail Assessment Study 2005, Shoppoint and King Sturge
2. Peterborough Shopping Household Telephone Survey
3. 2007 Update - Huntingdonshire Retail Assessment
4. 2007 price base
5. Mintel Retail Rankings 2008

Retention Rate	62%
Outflow	38%
Undertrading/Overtrading =	-£2,030,865
Outflow =	£14,551,266
Residual =	£12,520,401

EXPENDITURE DISTRIBUTION / MARKET SHARE BY ZONE 2013 - NO CHANGE

Table 7

	PE7 3	PE7 8 Hampton	Great Haddon	Total Trade From Catchment	Inflow	Total T/O
Total Expenditure	£27,155,343	£19,770,055	£5,528,914			
Main Food	£20,366,507	£14,827,541	£4,146,685			
Top-up	£6,788,836	£4,942,514	£1,382,228			
District Centre Foodstore						
Neighbourhood Centre Supermarkets						
Tesco Extra, Serpentine Green	£11,982,295	£11,392,494	£2,432,722	£25,807,511	65%	£73,735,747
Co-op Rainbow, Yaxley	£3,428,362	£1,754,592	£684,203	£5,867,158	25%	£7,822,877
Other Yaxley Convenience Stores	£543,107	£98,850	£110,578	£752,535	5%	£792,143
Other	£169,721	£123,563	£34,556	£327,839	0%	£327,839
Outside Catchment Area						
Morrisons, Lincoln Road	£407,330	£296,551	£82,934	£786,815		
Asda, Rivergate	£1,866,930	£1,062,640	£380,113	£3,309,683		
Sainsbury's, Bretton	£882,549	£593,102	£179,690	£1,655,340		
Sainsbury's, Oxney Road	£1,765,097	£1,285,054	£359,379	£3,409,530		
Waitrose, Queensgate	£339,442	£247,126	£69,111	£655,679		
Aldi, Whittlesey Road	£1,154,102	£691,952	£234,979	£2,081,033		
Co-op, Orton	£610,995	£148,275	£124,401	£883,671		
Co-op, Sawtry	£101,833	£24,713	£27,645	£154,190		
Co-op Rainbow, Ramsey	£610,995	£49,425	£124,401	£784,821		
Tesco, Werrington	£441,274	£296,551	£89,845	£827,670		
Tesco Metro, Hereward Centre	£509,163	£321,263	£103,667	£934,093		
Tesco Extra, Northampton	£305,498	£222,413	£62,200	£590,111		
Tesco, Huntingdon	£203,665	£148,275	£41,467	£393,407		
Somerfield, Whittlesey	£780,716	£444,826	£158,956	£1,384,499		
Other	£1,052,270	£568,389	£228,068	£1,848,726		
Totals	£27,155,343	£19,770,055	£5,528,914	£52,454,312		

Notes / Sources

1. Peterborough Shopping Household Telephone Survey
2. 2007 Update - Huntingdonshire Retail Assessment
3. Main Food expenditure comprises 75% of total convenience spending
4. Tesco Extra Serpentine Green % of inflow adjusted to reflect growing indigenous population

TURNOVER OF STORES 2013 - NO CHANGE

Table 8

Existing Estimated Turnover - All Convenience Stores in Study Area

	Convenience sqm net	Sales Density	Benchmark	Estimated Benchmark From Catchment	Current Trade Draw By Market Share	Available Spending £52,454,312
District Centre Foodstore						
Neighbourhood Centre Supermarkets						
Tesco Extra, Serpentine Green	5,429	£13,023	£70,704,171	£24,746,460	£25,807,511	
Co-op Rainbow, Yaxley	800	£6,840	£5,471,979	£4,103,985	£5,867,158	
Other Yaxley Convenience Stores	450	£2,020	£909,034	£863,582	£752,535	
Other					£327,839	
Total For Catchment	6,679		£77,085,184	£29,714,026	£32,755,044	
Morrisons, Lincoln Road	2,487	£11,285	£28,066,167		£786,815	
Asda, Rivergate	2,199	£14,496	£31,876,834		£3,309,683	
Sainsbury's, Bretton	2,862	£9,842	£28,167,249		£1,655,340	
Sainsbury's, Oxney Road	2,520	£9,842	£24,801,351		£3,409,530	
Waitrose, Queensgate	1,313	£11,717	£15,385,006		£655,679	
Aldi, Whittlesey Road	679	£3,950	£2,682,224		£2,081,033	
Co-op, Orton	1,123	£6,840	£7,681,291		£883,671	
Co-op, Sawtry	40	£6,840	£273,599		£154,190	
Co-op Rainbow, Ramsey	950	£6,840	£6,497,976		£784,821	
Tesco, Werrington	1,130	£13,023	£14,716,469		£827,670	
Tesco Metro, Hereward Centre	1,813	£13,023	£23,611,468		£934,093	
Tesco Extra, Northampton	3,420	£13,023	£44,540,111		£590,111	
Tesco, Huntingdon	3,100	£13,023	£40,372,615		£393,407	
Somerfield, Whittlesey	525	£6,393	£3,356,077		£1,384,499	
Other					£1,848,726	
Total Outside Catchment					£19,699,268	

Notes/Sources:

1. Floorspace from 2009 Peterborough Retail Study, Huntingdonshire Retail Assessment Study 2005, Shoppoint and King Sturge
2. 2007 price base
3. Mintel Retail Rankings 2008 adjusted to allow for increases in sales density

Retention Rate	62%
Outflow	38%
Undertrading/Overtrading =	£3,041,017
Outflow =	£19,699,268
Residual =	£22,740,286

EXPENDITURE DISTRIBUTION / MARKET SHARE BY ZONE 2013 WITH FOODSTORE

Table 9

	PE7 3	PE7 8 Hampton	Great Haddon	Total Trade From Catchment	Inflow	Total Turnover
Total Expenditure	£27,155,343	£19,770,055	£5,528,914			
Main Food	£20,366,507	£14,827,541	£4,146,685			
Top-up	£6,788,836	£4,942,514	£1,382,228			
District Centre Foodstore	£6,653,059	£1,210,916	£3,773,484	£11,637,459	25%	£15,516,611
Neighbourhood Centre Supermarkets						
Tesco Extra, Serpentine Green	£9,063,096	£11,268,931	£400,846	£20,732,873	70%	£68,661,109
Co-op Rainbow, Yaxley	£2,919,199	£1,705,167	£124,401	£4,748,767	27%	£6,704,486
Other Yaxley Convenience Stores	£475,219	£98,850	£62,200	£636,269	6%	£675,876
Other	£169,721	£123,563	£13,822	£307,106	0%	£307,106
Outside Catchment Area						
Morrisons, Lincoln Road	£407,330	£296,551	£69,111	£772,992		
Asda, Rivergate	£1,255,935	£988,503	£110,578	£2,355,016		
Sainsbury's, Bretton	£610,995	£593,102	£110,578	£1,314,675		
Sainsbury's, Oxney Road	£950,437	£840,227	£110,578	£1,901,243		
Waitrose, Queensgate	£339,442	£247,126	£69,111	£655,679		
Aldi, Whittlesey Road	£746,772	£691,952	£110,578	£1,549,302		
Co-op, Orton	£509,163	£148,275	£82,934	£740,372		
Co-op, Sawtry	£101,833	£24,713	£27,645	£154,190		
Co-op Rainbow, Ramsey	£509,163	£49,425	£82,934	£641,522		
Tesco, Werrington	£441,274	£296,551	£69,111	£806,937		
Tesco Metro, Hereward Centre	£509,163	£321,263	£82,934	£913,360		
Tesco Extra, Northampton	£101,833	£74,138	£20,733	£196,704		
Tesco, Huntingdon	£203,665	£74,138	£20,733	£298,536		
Somerfield, Whittlesey	£577,051	£271,838	£76,023	£924,912		
Other	£610,995	£444,826	£110,578	£1,166,400		
Totals	£27,155,343	£19,770,055	£5,528,914	£52,454,312		

Notes/Sources

1. Peterborough Shopping Household Telephone Survey
2. 2007 Update - Huntingdonshire Retail Assessment
3. Main Food expenditure comprises 75% of total convenience spending

TURNOVER OF STORES 2013 WITH FOODSTORE

Table 10

Existing Estimated Turnover - All Convenience Stores

	Convenience sqm net	Sales Density	Benchmark	Estimated Benchmark From Catchment	Current Trade Draw By Market Share	Available Spending £52,454,312
District Centre Foodstore	3,000	£11,110	£33,331,240	£24,998,430	£11,637,459	
Neighbourhood Centre Supermarkets						
Tesco Extra, Serpentine Green	5,429	£13,023	£70,704,171	£21,211,251	£20,732,873	
Co-op Rainbow, Yaxley	800	£6,840	£5,471,979	£4,103,985	£4,748,767	
Other Yaxley Convenience Stores	450	£2,020	£909,034	£863,582	£636,269	
Other					£307,106	
Total For Catchment	9,679		£110,416,424	£51,177,248	£38,062,474	
Morrisons, Lincoln Road	2,487	£11,285	£28,066,167		£772,992	
Asda, Rivergate	2,199	£14,496	£31,876,834		£2,355,016	
Sainsbury's, Bretton	2,862	£9,842	£28,167,249		£1,314,675	
Sainsbury's, Oxney Road	2,520	£9,842	£24,801,351		£1,901,243	
Waitrose, Queensgate	1,313	£11,717	£15,385,006		£655,679	
Aldi, Whittlesey Road	679	£3,950	£2,682,224		£1,549,302	
Co-op, Orton	1,123	£6,840	£7,681,291		£740,372	
Co-op, Sawtry	40	£6,840	£273,599		£154,190	
Co-op Rainbow, Ramsey	950	£6,840	£6,497,976		£641,522	
Tesco, Werrington	1,130	£13,023	£14,716,469		£806,937	
Tesco Metro, Hereward Centre	1,813	£13,023	£23,611,468		£913,360	
Tesco Extra, Northampton	3,420	£13,023	£44,540,111		£196,704	
Tesco, Huntingdon	3,100	£13,023	£40,372,615		£298,536	
Somerfield, Whittlesey	525	£6,393	£3,356,077		£924,912	
Other					£1,166,400	
Total Outside Catchment					£14,391,838	

Notes/Sources:

1. Floorsapce from 2009 Peterborough Retail Study, Huntingdonshire Retail Assessment Study 2005, Shoppoint and King Sturge
2. 2007 price base
3. Mintel Retail Rankings 2008 adjusted to allow for an increase in sales floor efficiency

Retention Rate	73%
Outflow	27%
Undertrading/Overtrading =	-£13,114,773
Outflow =	£14,391,838
Residual =	£1,277,064

IMPACT ON STORES 2013 WITH FOODSTORE

Table 11

Impact on Turnover Derived from Catchment Area 2013

	Total Turnover With no Retail	Total T/O with District Centre	Difference	% Impact
District Centre Foodstore	£0	£11,637,459	£11,637,459	
Neighbourhood Centre Supermarkets				
Tesco Extra, Serpentine Green	£25,807,511	£20,732,873	£-5,074,638	-0.20
Co-op Rainbow, Yaxley	£5,867,158	£4,748,767	£-1,118,390	-0.19
Other Yaxley Convenience Stores	£752,535	£636,269	£-116,266	-0.15
Other	£327,839	£307,106	£-20,733	-0.06
Morrisons, Lincoln Road	£786,815	£772,992	£-13,822	0.0
Asda, Rivergate	£3,309,683	£2,355,016	£-954,667	-0.3
Sainsbury's, Bretton	£1,655,340	£1,314,675	£-340,665	-0.2
Sainsbury's, Oxney Road	£3,409,530	£1,901,243	£-1,508,288	-0.4
Waitrose, Queensgate	£655,679	£655,679	£0	0.0
Aldi, Whittlesey Road	£2,081,033	£1,549,302	£-531,731	-0.3
Co-op, Orton	£883,671	£740,372	£-143,299	-0.2
Co-op, Sawtry	£154,190	£154,190	£0	0.0
Co-op Rainbow, Ramsey	£784,821	£641,522	£-143,299	-0.2
Tesco, Werrington	£827,670	£806,937	£-20,733	0.0
Tesco Metro, Hereward Centre	£934,093	£913,360	£-20,733	0.0
Tesco Extra, Northampton	£590,111	£196,704	£-393,407	-0.7
Tesco, Huntingdon	£393,407	£298,536	£-94,871	-0.2
Somerfield, Whittlesey	£1,384,499	£924,912	£-459,587	-0.3
Other	£1,848,726	£1,166,400	£-682,327	-0.4

Notes/Sources:

1. Assumes Foodstore in District Centre is open but its attraction is diminished as other shops and services are not yet open

EXPENDITURE DISTRIBUTION / MARKET SHARE BY ZONE 2021 - NO CHANGE

Table 12

	PE7 3	PE7 8 Hampton	Great Haddon	Total Trade		
				From		
				Catchment	Inflow	Total Turnover
Total Expenditure	£30,554,501	£31,342,856	£20,757,644			
Main Food	£22,915,876	£23,507,142	£15,568,233			
Top-up	£7,638,625	£7,835,714	£5,189,411			
District Centre Foodstore						
Neighbourhood Centre Supermarkets						
Tesco Extra, Serpentine Green	£13,482,174	£18,061,321	£9,133,363	£40,676,858	50%	£81,353,716
Co-op Rainbow, Yaxley	£3,857,506	£2,781,678	£2,568,758	£9,207,943	25%	£12,277,257
Other Yaxley Convenience Stores	£611,090	£156,714	£415,153	£1,182,957	5%	£1,245,218
Other	£190,966	£195,893	£129,735	£516,594	0%	£516,594
Outside Catchment Area						
Morrisons, Lincoln Road	£458,318	£470,143	£311,365	£1,239,825		
Asda, Rivergate	£2,100,622	£1,684,679	£1,427,088	£5,212,388		
Sainsbury's, Bretton	£993,021	£940,286	£674,623	£2,607,930		
Sainsbury's, Oxney Road	£1,986,043	£2,037,286	£1,349,247	£5,372,575		
Waitrose, Queensgate	£381,931	£391,786	£259,471	£1,033,188		
Aldi, Whittlesey Road	£1,298,566	£1,097,000	£882,200	£3,277,766		
Co-op, Orton	£687,476	£235,071	£467,047	£1,389,595		
Co-op, Sawtry	£114,579	£39,179	£103,788	£257,546		
Co-op Rainbow, Ramsey	£687,476	£78,357	£467,047	£1,232,880		
Tesco, Werrington	£496,511	£470,143	£337,312	£1,303,965		
Tesco Metro, Hereward Centre	£572,897	£509,321	£389,206	£1,471,424		
Tesco Extra, Northampton	£343,738	£352,607	£233,523	£929,869		
Tesco, Huntingdon	£229,159	£229,071	£155,682	£619,913		
Somerfield, Whittlesey	£878,442	£705,214	£596,782	£2,180,438		
Other	£1,183,987	£901,107	£856,253	£2,941,347		
Totals	£30,554,501	£31,342,856	£20,757,644	£82,655,001		

Notes/Sources

1. Peterborough Shopping Household Telephone Survey
2. 2007 Update - Huntingdonshire Retail Assessment
3. Main Food expenditure comprises 75% of total convenience spending
4. Tesco Extra Serpentine Green % of inflow adjusted to reflect growing indigenous population

TURNOVER OF STORES 2021 - NO CHANGE

Table 13

Existing Estimated Turnover - All Convenience Stores in Study Area

	Convenience sqm net	Sales Density	Benchmark	Estimated Benchmark From Catchment	Current Trade Draw By Market Share	Available Spending £82,655,001
District Centre Foodstore						
Neighbourhood Centre Supermarkets						
Tesco Extra, Serpentine Green	5,429	£13,286	£72,130,689	£28,852,276	£40,676,858	
Co-op Rainbow, Yaxley	800	£6,978	£5,582,381	£4,186,786	£9,207,943	
Other Yaxley Convenience Stores	450	£2,061	£927,374	£881,006	£1,182,957	
Other					£516,594	
Total For Catchment	6,679		£78,640,445	£33,920,068	£51,584,351	
Morrisons, Lincoln Road	2,487	£11,513	£28,632,427		£1,239,825	
Asda, Rivergate	2,199	£14,789	£32,519,977		£5,212,388	
Sainsbury's, Bretton	2,862	£10,040	£28,735,548		£2,607,930	
Sainsbury's, Oxney Road	2,520	£10,040	£25,301,740		£5,372,575	
Waitrose, Queensgate	1,313	£11,954	£15,695,412		£1,033,188	
Aldi, Whittlesey Road	679	£4,030	£2,736,341		£3,277,766	
Co-op, Orton	1,123	£6,978	£7,836,268		£1,389,595	
Co-op, Sawtry	40	£6,978	£279,119		£257,546	
Co-op Rainbow, Ramsey	950	£6,978	£6,629,078		£1,232,880	
Tesco, Werrington	1,130	£13,286	£15,013,387		£1,303,965	
Tesco Metro, Hereward Centre	1,813	£13,286	£24,087,850		£1,471,424	
Tesco Extra, Northampton	3,420	£13,286	£45,438,747		£929,869	
Tesco, Huntingdon	3,100	£13,286	£41,187,168		£619,913	
Somerfield, Whittlesey	525	£6,522	£3,423,789		£2,180,438	
Other					£2,941,347	
Total Outside Catchment					£31,070,650	

Notes/Sources:

1. Floorsapce from 2009 Peterborough Retail Study, Huntingdonshire Retail Assessment Study 2005, Shoppoint and King Sturge
2. 2007 price base
3. Mintel Retail Rankings 2008 adjusted to allow for an increase in sales densities

Retention Rate	62%
Outflow	38%
Undertrading/Overtrading =	£17,664,284
Outflow =	£31,070,650
Residual =	£48,734,934

EXPENDITURE DISTRIBUTION / MARKET SHARE BY ZONE 2021 WITH GREAT HADDON RETAIL

Table 14

	PE7 3	PE7 8 Hampton	Great Haddon	Total Trade From Catchment	Inflow	Total Turnover
Total Expenditure	£30,554,501	£31,342,856	£20,757,644			
Main Food	£22,915,876	£23,507,142	£15,568,233			
Top-up	£7,638,625	£7,835,714	£5,189,411			
District Centre Foodstore	£9,089,964	£2,037,286	£12,973,528	£24,100,777	25%	£32,134,370
Neighbourhood Centre Supermarkets	£1,527,725	£313,429	£2,906,070	£4,747,224	5%	£4,997,078
Tesco Extra, Serpentine Green	£9,242,737	£17,708,714	£1,297,353	£28,248,803	60%	£68,925,661
Co-op Rainbow, Yaxley	£3,170,029	£2,585,786	£415,153	£6,170,968	33%	£9,240,282
Other Yaxley Convenience Stores	£534,704	£156,714	£129,735	£821,153	7%	£883,414
Other	£190,966	£195,893	£51,894	£438,753	0%	£438,753
Outside Catchment Area						
Morrisons, Lincoln Road	£381,931	£470,143	£207,576	£1,059,651		
Asda, Rivergate	£725,669	£1,567,143	£311,365	£2,604,177		
Sainsbury's, Bretton	£420,124	£901,107	£207,576	£1,528,808		
Sainsbury's, Oxney Road	£725,669	£1,332,071	£285,418	£2,343,158		
Waitrose, Queensgate	£381,931	£391,786	£181,629	£955,346		
Aldi, Whittlesey Road	£840,249	£1,097,000	£363,259	£2,300,508		
Co-op, Orton	£496,511	£235,071	£207,576	£939,159		
Co-op, Sawtry	£114,579	£39,179	£51,894	£205,652		
Co-op Rainbow, Ramsey	£496,511	£78,357	£207,576	£782,444		
Tesco, Werrington	£496,511	£470,143	£233,523	£1,200,177		
Tesco Metro, Hereward Centre	£458,318	£509,321	£207,576	£1,175,215		
Tesco Extra, Northampton	£114,579	£117,536	£77,841	£309,956		
Tesco, Huntingdon	£229,159	£117,536	£77,841	£424,536		
Somerfield, Whittlesey	£534,704	£391,786	£129,735	£1,056,225		
Other (Tesco, March, Hotsmoor Avenue)	£381,931	£626,857	£233,523	£1,242,312		
Totals	£30,554,501	£31,342,856	£20,757,644	£82,655,001		

Notes/Sources

1. Peterborough Shopping Household Telephone Survey
2. 2007 Update - Huntingdonshire Retail Assessment
3. Main Food expenditure comprises 75% of total convenience spending

TURNOVER OF STORES 2021 WITH FOODSTORE

Table 15

Existing Estimated Turnover - All Convenience Stores

	Convenience sqm net	Sales Density	Benchmark	Estimated Benchmark From Catchment	Current Trade Draw By Market Share	Available Spending £82,655,001
District Centre Foodstore	3,000	£11,335	£34,003,727	£25,502,795	£24,100,777	
Neighbourhood Centre Supermarkets	1,200	£4,122	£4,945,997	£4,698,697	£4,747,224	
Tesco Extra, Serpentine Green	5,429	£13,286	£72,130,689	£28,852,276	£28,248,803	
Co-op Rainbow, Yaxley	800	£6,978	£5,582,381	£4,186,786	£6,170,968	
Other Yaxley Convenience Stores	450	£2,061	£927,374	£881,006	£821,153	
Other					£438,753	
Total For Catchment	10,879		£117,590,168	£64,121,559	£64,527,678	
Morrisons Lincoln Road	2,487	£11,513	£28,632,427		£1,059,651	
Asda, Rivergate	2,199	£14,789	£32,519,977		£2,604,177	
Sainsbury's, Bretton	2,862	£10,040	£28,735,548		£1,528,808	
Sainsbury's, Oxney Road	2,520	£10,040	£25,301,740		£2,343,158	
Waitrose, Queensgate	1,313	£11,954	£15,695,412		£955,346	
Aldi, Whittlesey Road	679	£4,030	£2,736,341		£2,300,508	
Co-op, Orton	1,123	£6,978	£7,836,268		£939,159	
Co-op, Sawtry	40	£6,978	£279,119		£205,652	
Co-op Rainbow, Ramsey	950	£6,978	£6,629,078		£782,444	
Tesco, Werrington	1,130	£13,286	£15,013,387		£1,200,177	
Tesco Metro, Hereward Centre	1,813	£13,286	£24,087,850		£1,175,215	
Tesco Extra, Northampton	3,420	£13,286	£45,438,747		£309,956	
Tesco, Huntingdon	3,100	£13,286	£41,187,168		£424,536	
Somerfield, Whittlesey	525	£6,522	£3,423,789		£1,056,225	
Other					£1,242,312	
Total Outside Catchment					£18,127,323	

Notes/Sources:

1. Floorspace from 2009 Peterborough Retail Study, Huntingdonshire Retail Assessment Study 2005, Shoppoint and King Sturge
2. 2006 price base
3. Mintel Retail Rankings

Retention Rate	78%
Outflow	22%
Undertrading/Overtrading =	£406,119
Outflow =	£18,127,323
Residual =	£18,533,442

IMPACT ON STORES 2021 WITH GREAT HADDON RETAIL

Table 16

Impact on Turnover Derived from Catchment Area 2021

	Total Turnover with no Foodstore	Total T/O with Great Haddon Retail	Difference	% Impact
District Centre Foodstore	£0	£24,100,777	£24,100,777	
Neighbourhood Centre Supermarkets	£0	£4,747,224	£4,747,224	
Tesco Extra, Serpentine Green	£40,676,858	£28,248,803	-£12,428,055	-0.31
Co-op Rainbow, Yaxley	£9,207,943	£6,170,968	-£3,036,975	-0.33
Other Yaxley Convenience Stores	£1,182,957	£821,153	-£361,804	-0.31
Other	£516,594	£438,753	-£77,841	-0.15
Morrisons, Lincoln Road	£1,239,825	£1,059,651	-£180,174	-0.1
Asda, Rivergate	£5,212,388	£2,604,177	-£2,608,212	-0.5
Sainsbury's, Bretton	£2,607,930	£1,528,808	-£1,079,122	-0.4
Sainsbury's, Oxney Road	£5,372,575	£2,343,158	-£3,029,417	-0.6
Waitrose, Queensgate	£1,033,188	£955,346	-£77,841	-0.1
Aldi, Whittlesey Road	£3,277,766	£2,300,508	-£977,259	-0.3
Co-op, Orton	£1,389,595	£939,159	-£450,436	-0.3
Co-op, Sawtry	£257,546	£205,652	-£51,894	-0.2
Co-op, Rainbow, Ramsey	£1,232,880	£782,444	-£450,436	-0.4
Tesco, Werrington	£1,303,965	£1,200,177	-£103,788	-0.1
Tesco Metro, Hereward Centre	£1,471,424	£1,175,215	-£296,209	-0.2
Tesco Extra, Northampton	£929,869	£309,956	-£619,913	-0.7
Tesco, Huntingdon	£619,913	£424,536	-£195,377	-0.3
Somerfield, Whittlesey	£2,180,438	£1,056,225	-£1,124,214	-0.5
Other	£2,941,347	£1,242,312	-£1,699,035	-0.6

APPENDIX 4

TOWN CENTRE HEALTH CHECKS

Introduction

- 1.1 In order to gauge the likely impact the scheme will have on the vitality and viability of the existing retail centres, we must first understand the roles and functions they play in the context of the wider area.
- 1.2 Health checks provide a qualitative assessment of the retail health of the centres likely to be affected by the development proposed at Great Haddon.
- 1.3 This qualitative assessment is based on a number of different indicators covered within PPS6 Planning for Town Centres which sets out national guidance on how to assess the vitality and viability of town centres. Some of these key indicators include:
 - Retailer representation and diversity of uses;
 - Proportion of vacant street level property;
 - Quality of the environment;
 - Accessibility; and
 - Pedestrian flows.

Methodology

- 1.4 The first stage in this process is to ascertain which areas should be examined. In consultation with Peterborough City Council, King Sturge considers that retail health checks should be carried out for the following areas:
 - Hampton (Serpentine Green) District Centre;
 - Yaxley;
 - Sawtry; and
 - Orton District Centre.
- 1.5 As indicated on the Site Catchment Area Plan (Appendix 2), both Hampton and Yaxley lie within the catchment area boundary. Sawtry and Orton are located outside the catchment boundary – Sawtry to the south and Orton to the north.
- 1.6 Located northeast of the application site and south of Peterborough city centre, Hampton is classed as a district centre (of which there are five in Peterborough – Bretton, Hampton, Millfield, Orton and Werrington). Hampton is home to the Serpentine Green shopping centre which is anchored by a large Tesco Extra supermarket and a number of other large retailers.
- 1.7 Immediately east of the application site and also located within the catchment area boundary is Yaxley. The retail provision here is located at the dated and rundown Yaxley Shopping Centre and on nearby Main Street. There is also a newer and relatively large (approximately 1,000 square metres net) Co-op Rainbow store approximately 400m north of Yaxley Shopping Centre.
- 1.8 Sawtry is a small conurbation located immediately south of the catchment area boundary. As well as a parade of shops, Sawtry also has a reasonable sized Co-op, school, sports centre and other facilities commensurate with its size.
- 1.9 Orton is a district centre which is currently undergoing a significant amount of development. Orton is located north of the application site and to the west of Peterborough City Centre and provides a relatively good level of retail and other facilities and services.

- 1.10 Each area has been assessed individually and reports for each centre are included here in the appendix.

Retailer Representation and Diversity of Uses

- 1.11 In line with guidance set out in PPS6, retailer representation can provide a useful indicator as to the vitality and viability of a town centre. Any intentions to change retailer representation should also be analysed as this can be an early indication of the changing status of an existing retail centre.
- 1.12 A high number of national/multiple retailers in the high street is usually an indication of a healthy and vibrant town centre. On the other hand, a proliferation of independent budget retailers and charity shops is usually an indication of a less affluent and less viable town centre.
- 1.13 However, that said, diversity in the range and variety of quality independents can add to the appeal and individuality of centres.

Vacancies

- 1.14 The number of vacant premises and whether there is any evident demand from retailers wanting to come to the centre is another useful indication of a town centre's health that should be monitored and assessed.

Quality of the Environment

- 1.15 The state of the town centre and its environmental quality also offers an insight into the health and vitality of a town centre. Indicators such as excessive litter, vandalism and graffiti, air pollution, noise and obvious antisocial behaviour can be evidence of an area in decline. Conversely, attractive landscaping, street furniture, open spaces and a well-used public realm can all be positive indicators.

Accessibility

- 1.16 Notwithstanding the aims of PPG13 to reduce the use of private vehicles, it's important to recognise that the majority of shoppers generally use private cars for both food shopping and non-food shopping trips. Therefore, the ease with which the shoppers can access a town and the availability of car parking have also been assessed.
- 1.17 As part of the accessibility assessment, the availability, reliability and frequency of public transport should have also been considered.
- 1.18 The availability of services and facilities for pedestrians, cyclists and disabled people are also important in assessing a centre's retail health. Poor linkages will frequently equate to a failing and less viable town centre.

Pedestrian Flows

- 1.19 Guidance in PPS6 indicates that pedestrian flows (footfall) is a key indicator of the vitality of shopping streets. This should be monitored on different days both during the day and in the evening to gain a clearer understanding of who is using the town centre, for what purposes and when.

HAMPTON (SERPENTINE GREEN) – HEALTH CHECK

- 1.20 Located northeast of the application site and approximately 2.5 miles south of Peterborough City Centre, Hampton is one of the city's five district centres.
- 1.21 Its main shopping provision is at Serpentine Green which is a modern purpose built shopping centre that was built in 1999.
- 1.22 According to Experian GOAD data, the centre has a total floorspace of 27,564 square metres (gross).
- 1.23 The Tesco Extra (9,048 square metres (net)) is by far the largest store at Serpentine Green and is the anchor store for the centre.

Retailer Representation and Diversity of Uses

- 1.24 As already mentioned, the Tesco Extra is Serpentine Green's main anchor store. The entire length of the store – which includes 76 tills – is open-fronted so that customers can enter the supermarket from any point along its lengthy shop frontage within the shopping centre. Around 60% of its floorspace is used for food retail. The remaining space is taken up by a large clothing section, electrical department, household goods and furnishings, DVDs and other media as well as a pharmacy and optician.
- 1.25 There is also an excellent range of other large multiple retailers represented at the centre including Next, H&M, River Island, Boots the Chemist, WH Smith, Game, Burton, Ann Harvey, Dorothy Perkins and New Look. Of these major high street retailers, all also have stores at the Queensgate Shopping Centre.
- 1.26 In addition to the good range of fashion and multiple retailers there is also a large First Choice travel agents.
- 1.27 We also noted a number of smaller independent shops at the centre including a Chinese medicine shop, a hairdresser, nail salon and some food and drink establishments.
- 1.28 It should be noted that apart from the convenience offer provided by the Tesco Extra, the main retail presence was heavily dominated by fashion retailers.
- 1.29 A couple of the larger units were vacant; notably Whittard and Bay Trading had recently vacated premises in the centre. However, it should be noted that these companies have failed nationally with closures throughout the country rather than due to specific conditions at Serpentine Green.

Quality of the Environment

- 1.30 Set around a covered shopping centre, Serpentine Green has the character and, to a certain extent, function of an out-of-town shopping centre. The building has a modern design that lets in plenty of natural light and offers visitors a pleasant environment in which to shop.
- 1.31 The interior is well lit and there are plenty of seating areas and facilities such as toilets and wash rooms.
- 1.32 Externally, however, there is very little open-air space that can be used for rest and relaxation. There is also very little in the way of community facilities.
- 1.33 There did not appear to be any evidence of graffiti, crime or other anti-social behaviour.

Accessibility

- 1.34 With good road connections off the A1 and Peterborough Parkway A1139, Serpentine Green is easily accessible by car and there are approximately 2,000 free car parking spaces at Serpentine Green. The majority of shoppers appear to travel to the centre by private vehicle.
- 1.35 However, the centre is served by good bus networks including many small 'village hopper' services which connect the centre with the surrounding villages. There is also a bus service connecting the centre with Peterborough City Centre.
- 1.36 There are also numerous cycle storage areas but these did not appear to be particularly well-used and we would surmise that proportionally very few people cycle to the centre. Similarly, the pedestrian links with the centre are not particularly prominent and we saw very little evidence of people walking to the centre.

Pedestrian Flows

- 1.37 Serpentine Green was reasonably busy at the time of our site visit and offers shoppers a good range of quality retailers in a convenient and easily accessible location.
- 1.38 Whilst all the stores appeared to have a steady flow of customers, the large Tesco Extra is the anchor store and is by far the busiest retailer in the centre.
- 1.39 This said, the southern end of Serpentine Green beyond the 'Food Court' area appeared to be a redundant space that was presently underutilised.

Conclusion

- 1.40 Built relatively recently in 1999, Serpentine Green is a shopping centre that provides an alternative to the traditional high street shopping environment that offers a good range of comparison and convenience shops.
- 1.41 The centre is anchored by the large Tesco Extra which draws a large number of shoppers to the centre.
- 1.42 Overall Serpentine Green is a healthy and well-functioning district centre that offers a pleasant retail experience for shoppers.

YAXLEY – HEALTH CHECK

- 1.43 Located immediately east of the application site and south of Peterborough City Centre, Yaxley is a relatively large village that is easily accessed off the A15.

Retailer Representation and Diversity of Uses

- 1.44 The main retail provision is located at Yaxley Shopping Centre – a dated and neglected post-war era (circa 1960) development which is set around Maltings Square. There are also a small number of shops on nearby Main Street to the south of the shopping centre.
- 1.45 Yaxley Shopping Centre includes a number of independent retailers including takeaways, newsagents, hairdressers and fruit and veg stores.
- 1.46 There are four convenience stores at the centre – the largest of which is a small Spar store measuring approximately 400 square metres (net).
- 1.47 In addition to the retail offer, there is also a small library and the Yaxley Community Information Project.
- 1.48 Located separately in an out-of-centre location approximately 500m north of Yaxley Shopping Centre there is a relatively new Co-op Rainbow Store measuring approximately 1,000 square metres (net). This is a much newer store that has been built as part of a new residential development and provides a much more pleasant shopping experience than what's offered at Yaxley Shopping Centre. However, this is a purpose built store and there are no other shops or services in the immediate vicinity.

Quality of the Environment

- 1.49 Although set around a courtyard in a mixed-use environment with residential accommodation located above the shops, Yaxley Shopping Centre has been allowed to fall into a state of disrepair and would benefit from physical improvements and better town centre management.
- 1.50 The buildings appear old and neglected and there was some evidence of graffiti and litter.
- 1.51 By contrast, the newer Co-op Rainbow Store offers a much more aesthetically pleasing environment although this is somewhat severed from the village centre at Maltings Square.

Accessibility

- 1.52 Accessed off the A15, Yaxley is well connected by road.
- 1.53 Given its proximity to Peterborough City Centre, there is also good public transport links with the city centre.
- 1.54 Yaxley Shopping Centre provides a free car park which is shared by all the retailers.

Pedestrian Flows

- 1.55 Despite the poor appearance of Yaxley Shopping Centre, it does offer a wide variety of shops and services and appeared to be relatively well-used by the immediate populace.
- 1.56 Similarly, the Co-op Rainbow Store is well-used and appears to be trading healthily; it is in fact slightly overtrading as indicated in Table 5 and Table 6 (Appendix 3).

Conclusion

- 1.57 Despite its neglected and rather rundown appearance, Yaxley Shopping Centre is relatively well-used. This is likely to be thanks in part to the variety of independent retailers and the Spar store operating at the centre coupled with the nearby facilities such as a library and other community facilities.
- 1.58 Together there appears to be a sufficient range of shops and services to attract people to Yaxley Shopping Centre, despite its rundown appearance.
- 1.59 The newer Co-op Rainbow Store offers a much more modern shopping environment but is severed from what is on offer at Yaxley Shopping Centre and feels very separate.

SAWTRY – HEALTH CHECK

1.60 Located south of the catchment area and accessed directly off the A1(M), Sawtry is a medium-sized village in a semi-rural location; it is not adjoined to any other settlements in the region.

1.61 Sawtry is home to a junior school and a small sports centre.

1.62 Most of the development in Sawtry is on either side of the main road.

Retail Representation and Diversity of Uses

1.63 The main retail provision in Sawtry is located at the eastern end of the village in the form of a parade of shops. The parade of shops includes a bookmakers, takeaway, newsagents, estate agents (currently vacant May 2009), small veterinary practice, dry cleaners, hairdresser and a small Best-One convenience store selling a limited selection of frozen and chilled foods.

1.64 The main convenience retail offer is located in the centre of the village next door to the Post Office in the form of a Co-op store. Measuring approximately 220 square metres (net), it offers a reasonable range of convenience shopping including a limited fruit and veg section, fresh bread and newspapers as well a small frozen food section.

1.65 The Co-op is of sufficient size for people to be able to carry out a reasonably substantial top-up shop. However, residents would still need to travel to one of the other larger supermarkets in order to fulfil their full shopping requirements.

Quality of the Environment

1.66 Sawtry is a pleasant small village in a semi-rural location which boasts a range of facilities and services commensurate with its size, stature and function.

1.67 There were no obvious signs of crime or antisocial behaviour.

1.68 Sawtry appears to offer a pleasant and relaxed living environment along with sufficient retail provision and community facilities to meet local needs. However, residents are still required to travel in order to carry out their main shopping trips.

Accessibility

1.69 There is an amount of free car parking available outside the parade of shops at the eastern end of the village. There is also a limited amount of parking directly outside the Co-op in the village centre.

1.70 There are numerous bus stops in convenient locations along the length of the main road that runs through Sawtry including stops outside the parade of shops and outside the Co-op and Post Office.

Pedestrian Flows

1.71 Walking also appeared popular and this was particularly apparent in the morning during the 'school run' when numerous children and families were seen walking to school.

Conclusion

1.72 In our opinion, Sawtry appears to offer a relatively good range of shops and services given its size and location.

- 1.73 In terms of its retail offer, Sawtry appears to be trading relatively well and there were no obvious signs of economic distress.
- 1.74 The main convenience retail offer was available at Co-op at which shoppers would be able to carry out a reasonably substantial top-up shop.

ORTON – HEALTH CHECK

- 1.75 Orton is one of five district centres in the region. It is located approximately three and half miles southwest of Peterborough City Centre and approximately one mile from the A1(M) junction.
- 1.76 The main retail offer is provided in relatively modern purpose-built units at the Orton District Retail Centre (also known as Ortongate Shopping) which is currently undergoing an extensive refurbishment programme.
- 1.77 It should be noted that as a result of the ongoing redevelopment work, there are currently (June 2009) a high level of vacancies at the centre and therefore this may have a bearing on how busy the centre was at the time of the site visit.

Retailer Representation and Diversity of Uses

- 1.78 Positioned next to a large, free car park, Orton District Retail Centre is home to a number of large retail units that are arranged around an open square. At the time of the site visit (June 2009) approximately half of the units were closed as the centre was undergoing extensive modernisation and refurbishment.
- 1.79 Of the three main stores whose fronts face the main car park, one, the former Wilkinson is currently closed for refurbishment; the other two include a modern newly-opened Co-op supermarket (approximately 1,500 square metres (net)) and a QD store which sells a variety of household goods and wares as well as a small convenience offer.
- 1.80 The Co-op sells a relatively good range of products and appears to be trading well.
- 1.81 Other stores and services in the main square at the Orton District Retail Centre that are open and trading include a NatWest Bank, Lloyds Pharmacy and a Wilkinson that has recently relocated from the store adjacent to the car park.
- 1.82 There are also a number of smaller independent stores. These include a fish and chip shop / takeaway food store, discount furniture store, betting shop and newsagent.
- 1.83 In addition to the retail provision, there is also a library, community school, health centre and Bushfields Sports Centre. There is also a new Police office in part of the refurbished area of the centre.

Quality of the Environment

- 1.84 Despite the disruption caused by the ongoing refurbishment works at the Orton District Retail Centre, its potential to become an attractive and popular district centre is evident.
- 1.85 Even in its partially completed state, the centre offers a good combination of retail, leisure and community facilities in a pleasant and compact environment that provides plenty of open space in the enclosed courtyard at the heart of the centre.
- 1.86 Prior to its redevelopment, Orton suffered from crime, graffiti and other forms of anti-social behaviour. However, the recent works appear to have been well-received by the local population and there were no obvious signs of crime or vandalism.
- 1.87 The single storey shops that face the car park lead through to a large square around which there are a number of shops and other community facilities. Above the groundfloor retail premises (most of which are currently closed for redevelopment) there are residential flats. The large square forms a central courtyard with plenty of open space, trees and benches. Combined this creates a pleasant mixed-use

environment that should prove popular once the centre's redevelopment is fully completed.

Accessibility

- 1.88 Positioned within quite a densely populated area, the centre seemed to be well-used by both pedestrians and cyclists.
- 1.89 There is also a large, free car park making it easily accessible for those with private vehicles.

Pedestrian Flows

- 1.90 Given the extent of the redevelopment, the Orton District Retail Centre was relatively busy and all the stores seemed to have sufficient trade and were trading healthily.

Conclusion

- 1.91 The Orton District Retail Centre seems to have benefited well from the ongoing refurbishment works. However, given the present high level of vacancies, it remains to be seen whether or not these will be filled once the works have been completed.
- 1.92 Overall, the centre offers a good range of shops, services and facilities in a handy central location. It benefits from good road and public transport connections and should, once completed, offer a pleasant mixed-use District centre that will thrive and prosper.