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Forest Heath District Council

Retail and Town Centre Study 2011

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1.0 INTRODUCTION

- 1.1 Strategic Perspectives LLP ('SP') was commissioned by Forest Heath District Council (FHDC) in June 2011 to prepare a retail and town centre strategy to update the Council's previous *Retail and Town Centres Study (FHDC RTCS 2006)*.
- 1.2 This updated study has been prepared in the context of current and emerging national and development plan policy guidance. It specifically takes into account the advice set out in the NPPF and '*Practice Guidance on Need, Impact and the Sequential Approach*'. It also reviews and takes account of the extant development plan policies and the emerging planning reforms at the national level.
- 1.3 The study findings will provide the necessary research and evidence base required by the Council to help inform the preparation of its future Development Plan Documents (DPDs). The study is also intended to help the Local Planning Authority (LPA) assess and determine planning applications for retail and town centre uses that are not in a centre and not in accordance with an up-to-date development plan.
- 1.4 This introductory section summarises the background to, and key aims of the study.

FOREST HEATH DISTRICT & ITS MAIN CENTRES

- 1.5 Forest Heath lies in the geographical centre of the East of England. It covers an area of over 37,398 hectares (144 square miles) and is comprised of a mix of urban and rural areas. The A11 and A14 transport corridors pass through the District and provide access to London, Norwich, Cambridge. Ipswich, the Midlands and other East Coast Ports. Almost half of the district is designated as a Special Landscape Area and there are 24 sites of Special Scientific Interest.
- 1.6 Forest Heath is the western most District in Suffolk County and is bordered by east Cambridgeshire District Council to the north west, and King's Lynn & West Norfolk and Breckland District Councils (in the County of Norfolk) to the north.
- 1.7 The District's population has increased from approximately 55,518 in 2001 to 64,316 in 2010 (taking into consideration those living on RAF bases¹). This population is mainly concentrated within the three main (market) towns of Newmarket, Brandon and Mildenhall. The rest of the population is spread across the District's key service centres, the largest of which is Lakenheath and the wider rural area. The Council's main policy and regeneration objective is to improve the social, economic and environmental well-being of the area, and it is recognised that town centres will be at the heart of this change.

* The 2001 Census and 2010 Census Update take into account 'people resident in communal establishments' in the District (e.g. those on US Air Bases).

- 1.8 The District is also home to the two largest US Air Force Europe (USAFE) bases in the UK, namely RAF Mildenhall and RAF Lakenheath. Together, they provide a major source of employment for the District and, according to the Council, account for approximately 10,000 United States Air Force (USAF) personnel and members of their families. Of these we understand approximately half live on base, with the other half living in various locations throughout the District, although they still have access to base services (see **Section 7.0**). Both bases are closed to the wider public and have a wide range of facilities and services on-site, including 'commissaries' selling food and household items, restaurants, take away food establishments, gyms and leisure centres, schools, health and veterinary facilities and ten-pin bowling. This has implications for any assessment of the need for new retail and leisure uses in the District.
- 1.9 Newmarket is also known world-wide as being the '*Home of Horseracing*'. The sport has gone hand in hand with Newmarket for almost 400 years. The town benefits from two world class race courses, which are located side-by-side to the south of the town centre.
- The **Rowley Mile Course** is a world class flat racing experience, and has 18 race days during April/May and September/October. It hosts the QIPCO Guineas Festival the first weekend in May, as well as the Cambridgeshire Meeting in the autumn. The facilities include the impressive Millennium Grandstand which opened in 2000.
 - The **July Course** is the summer racing track, which lies directly south of the Rowley Mile. The July Course hosts the Newmarket July Festival, as well as "Newmarket Nights" featuring open air concerts and "Summer Saturdays" which offer free day-time attractions for families.
- 1.10 In addition to the two courses, Newmarket and the surrounding areas offer 2,800 acres of training grounds, 62 stud farms, 113 kilometres of gallops and 79 licensed trainers. At any one time over 2,500 racehorses are in training, with most stabled in or near to the town centre. Newmarket's racing land has been protected from undue development by the Council's development plans over a number of years (see **Section 2.0**).
- 1.11 Other outdoor leisure and tourist pursuits are also recognised as an important part of the District's economy. The District is home to attractions such as the Centre Parcs Holiday Village near Elveden and the High Lodge Forest Centre near Brandon. The Council is seeking to further capitalise on its extensive woodland, countryside and outdoor offer through the proposed creation of a Brecks Regional Park and the enhancement of recreational water activities on the Little Ouse river.

SCOPE OF STUDY & EVIDENCE BASE

- 1.12 This study has been commissioned by the Council to assist and inform the further preparation of its development plan. It specifically focuses on practical recommendations as to the appropriate scale and type of new retail (convenience and comparison goods) and commercial leisure floorspace that can reasonably be accommodated in the District and its main centres over the development plan period.
- 1.13 The key requirement of this study, as set out in the Council's Brief, is to cover all the relevant issues relating to retail, leisure and other main town centre uses in the three market towns of Brandon, Mildenhall and Newmarket, together with the *Key Service Centres* of Lakenheath and Red Lodge. Other specific objectives include advice on:
- the impact on the provision of goods and services in the District of the United States Air Force military personnel and their dependants;
 - the tourism and retail potential of the horseracing and related industries in and around Newmarket;
 - the impact on the night-time economy on Newmarket;
 - how best to revitalise the centres of Brandon, Mildenhall and Lakenheath; and
 - the likely community needs of the developing *Key Service Centre* of Red Lodge.
- 1.14 The quantitative and qualitative research methodology used in this study to address the Council's aims takes account of national planning policy advice set out in the National Planning Policy Framework (NPPF) and the *PPS4 Good Practice Guidance* which remains a material consideration.
- 1.15 In order to address the Council's requirements in a robust and comprehensive manner, the study also draws on a number of key planning policy documents (including the Core Strategy adopted in May 2010) and other relevant evidence-based studies, including:
- **FHDC Retail and Town Centre Study (2006 FHDC RTCS)** – which provided the evidence base used to inform the adopted Core Strategy and the preparation of the LPAs other DPDs. The study was informed by a household survey, comprising 978 telephone interviews, and town centre health checks of the District's three main market towns.
 - **FHDC Retail Health Checks 1999-2011** - The Council has undertaken regular health check audits of the main centres of Newmarket, Brandon, Mildenhall and Lakenheath between 1999 and 2011. In addition, we have conducted our own audits of the centres which consider a wide range of Key Performance Indicators (KPIs) and planning data on the health of the main centres.
 - **'A Vision for Newmarket Town Centre' (April 2011)** – A study commissioned by Newmarket Town Council to address topics such as the presentation of the

town, transport, the market, tourism and promotions, the horseracing industry, trade and commerce, entertainment and the night-time economy. The study was informed by a working group of six town councillors and consultation with key individuals and organisations in the town centre, as well as a widely distributed survey completed by 514 individuals. The 'Vision' document will be used as evidence in the preparation of other future strategic planning documents.

- 1.16 In accordance with good practice, the study is underpinned by a telephone interview survey of 1,000 households conducted during September 2011 by NEMS Market Research ('NEMS'). The survey results help to establish current shopping/ leisure patterns, catchment areas and market shares for different types of comparison and convenience goods purchases[†]. The study (or 'catchment') area defined for the purpose of the household survey covers Forest Heath District and its hinterland (see **Appendix 1**). Where possible, the study area adopts the same geographic zones as defined by the 2006 *Retail Study* in order to facilitate analysis of any significant changes in shopping/ leisure patterns. The questionnaire is set out in **Appendix 2**. Please note that the full survey results are available separately from the Council.
- 1.17 This study is also underpinned by street interview surveys. The street interview surveys were undertaken in the main town centres of Newmarket, Brandon and Mildenhall over one week in September 2011 and sought to understand the use and linkages between town centre uses.
- 1.18 The results of the household survey and other research evidence have been used to inform the economic assessment of the capacity for new comparison goods retail floorspace over the forecast period (i.e. 2011, 2016, 2021, 2026 and 2031). However, it is important to state at the outset that, in our experience, forecasts beyond five years should be interpreted with caution. Indeed, in the context of the current economic downturn, even forecasts beyond 2-3 years could be subject to change. Whilst the results of the study are considered robust and appropriate at this point in time, we advise that the evidence base should be monitored regularly. If necessary, the retail assessment should be updated to take into account changes in retail expenditure and population growth forecasts, as well as any impacts arising from new development and key trends over time.
- 1.19 This study is also informed by the results of a Retail Planning Workshop which was hosted by Forest Heath District Council and held in Newmarket on 7th November 2011.

[†] Respondents were asked where they do most of their shopping for different types of retail goods, rather than where they last shopped. As a result the household survey results broadly reflect average year-round shopping patterns across the District.

REPORT STRUCTURE

1.20 This report draws together the results of our research, incorporating the findings of the detailed household survey-based analysis; the qualitative health check assessments; the on-street surveys; and the quantitative need (capacity) assessments for comparison and convenience goods retailing and commercial leisure uses.

1.21 The report is structured as follows:

- **Section 2.0** summarises existing and emerging national, regional and local retail planning policy framework, focusing particularly on relevant planning, regeneration, and leisure policies. This provides the policy context for this study.
- **Section 3.0** highlights some of the key trends that are driving the dynamic changes in the retail and leisure market and the way in which they are shaping the urban and retail landscape.
- **Section 4.0** defines the study (catchment) area that provides the framework for the household survey and economic assessment.
- **Section 5.0** considers the network and hierarchy of competing centres, taking into account the results of the household survey market share analysis for comparison and convenience goods shopping patterns.
- **Section 6.0** sets out the health check assessment of the overall vitality and viability of Newmarket. It is based on the key performance indicators (KPIs) set out in the *PPS4 Good Practice Guidance* and also draws on the findings of the household survey and on-street surveys undertaken in the three town centres.
- **Section 7.0** provides an overview of the role and function of Brandon and Mildenhall, as well as the District's Key Service Centres of Lakenheath and Red Lodge. As above, it draws on the findings of the household survey and health check assessment.
- **Section 8.0** describes the economic (capacity) assessment of the potential for new comparison and convenience goods retail floorspace in the District over the forecast period (i.e. up to 2031). The retail capacity forecasts take account of known commitments as agreed with the Council.
- **Section 9.0** examines the key trends driving market demand in the commercial leisure sector and forecasts the potential capacity for leisure provision within the District. It specifically considers the role of the horse-racing industry and night-time economy in the District, as well as the potential impact of the proposed increase in leisure and tourist facilities.
- **Section 10.0** draws together the key findings of the retail and commercial leisure needs assessments and sets out our overall conclusions and recommendations.

2.0 POLICY CONTEXT

- 2.1 This section summarises some of the Government's main objectives, policy and advice as set out in the recently published *National Planning Policy Framework* (NPPF) with regard to:
- sustainable development;
 - retail and leisure planning and town centres;
 - plan-making; and
 - economic development.
- 2.2 First, we provide a brief overview of the reforms to the planning system proposed and instigated by the new Coalition Government, including the NPPF. These are material considerations which (once adopted) will have a significant impact on the future planning and development of Britain's town centres.

COALITION GOVERNMENT'S PLANNING REFORM

- 2.3 The reform of the planning system is central to the new Coalition Government's programme. To date it has covered:
- the intention to abolish Regional Spatial Strategies;
 - the abolition of the Infrastructure Planning Commission (IPC);
 - the Comprehensive Spending Review (CSR);
 - the Government's 'Big Society' vision and the Localism Act; and
 - the consolidation of Government Planning Guidance into the streamlined National Planning Policy Framework (NPPF).
- 2.4 There has been considerable upheaval and confusion created by the Secretary of State's notification of the revocation of RSSs in July 2010. Following an appeal lodged by CALA Homes the High Court found in February 2011 that the Secretary of State's actions had been unlawful and effectively reinstated the status of RSSs. However, whilst RSSs remain in force, the Government's stated intention to abolish them is a material consideration and therefore limits the weight which can be attached to RSS policies.
- 2.5 The removal of the regional tier of policy will result in inevitable delays to the Local Plan process as authorities reassess their evidence bases in light of the 'void' in top-down policy requirements, and consider (re-)consulting on their Local Plans. Authorities have therefore been encouraged to make their position clear on the review of their Local Plan as a priority. The intention to return decision-making powers on housing and planning to local councils and neighbourhood plans has also raised

concerns that it could exacerbate 'nimbyism' at a time when bold steps are needed to tackle the economic recession and the UK's significant housing shortage.

- 2.6 The National Planning Policy Framework (NPPF) was published on 27th March 2012. It sets out the planning policies for England and how these are expected to be applied. It aims to strengthen local decision making and reinforce the importance of up-to-date plans. The policies in the Framework applied from the day of its publication and it supersedes all previous national planning policy statements and guidance, including Planning Policy Statement 1 (PPS1): *Delivering Sustainable Development* and PPS4: *Planning for Sustainable Economic Growth* (see Annex 3 to NPPF).
- 2.7 Like PPS4, the NPPF retains the town centre first approach, including the need to consider impact on town centre vitality and viability, and the sequential approach. However it provides limited guidance on the weight which should be attached to evidence of any impact arising from proposals. It also reaffirms the need for local authorities to allocate sufficient sites to accommodate identified need.

NATIONAL PLANNING POLICY FRAMEWORK

- 2.8 The NPPF must be taken into account in the preparation of Local Plans[‡] and Neighbourhood Plans[§]. Planning law requires that all applications for planning permission must be determined in accordance with the development plan, unless material considerations indicate otherwise[™]. The NPPF is a material consideration in determining planning applications^{††} and it states that proposed development that accords with an up-to-date Local Plan: *"...should be approved, and proposed development that conflicts should be refused unless other material considerations indicate otherwise. It is highly desirable that local planning authorities should have an up-to-date plan in place"* (paragraph 12).
- 2.9 Although regional strategies remain part of the development plan, it is the Government's clear intention under the Localism Act to revoke all regional strategies outside of London. Notwithstanding this, it is for the Local Planning Authority (LPA) to

[‡] Defined by NPPF (Annex 2) as the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. Current core strategies or other planning policies, which under the regulations would be considered to be development plan documents, form part of the Local Plan. The term includes old policies which have been saved under the 2004 Act.

[§] A plan prepared by a Parish Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

[™] Section 38(6) of the Planning and Compulsory Purchase Act 2004 and Section 70(2) of the Town and Country Planning Act 1990.

^{††} Sections 19(2)(a) and 38(6) of the Planning and Compulsory Purchase Act 2004 and section 70(2) of the Town and Country Planning Act 1990. In relation to neighbourhood plans, under section 38B and C and paragraph 8(2) of new Schedule 4B to the 2004 Act (inserted by the Localism Act 2011 section 116 and Schedules 9 and 10) the independent examiner will consider whether having regard to national policy it is appropriate to make the plan.

determine how much weight should be afforded to the regional strategy in their plan-making and development control decisions.

- 2.10 In terms of implementation, the NPPF (paragraph 214) states that for 12 months from the day of publication, decision-takers may continue to give full weight to relevant policies adopted since 2004^{††}, even if there is a limited degree of conflict with this Framework. It adds that in other cases and following this 12-month period, *"...due weight should be given to relevant policies in existing plans according to their degree of consistency with this framework (the closer the policies in the plan to the policies in the Framework, the greater the weight that may be given)"* (paragraph 215). From the day of publication, decision-takers may also give weight^{§§} to relevant policies in emerging plans according to:
- the stage of preparation of the emerging plan (the more advanced the preparation, the greater the weight that may be given);
 - the extent to which there are unresolved objections to relevant policies (the less significant the unresolved objections, the greater the weight that may be given); and
 - the degree of consistency of the relevant policies in the emerging plan to the policies in this Framework (the closer the policies in the emerging plan to the policies in the Framework, the greater the weight that may be given).
- 2.11 At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as *"a golden thread running through both plan-making and decision-taking"* (paragraph 14).
- 2.12 Sustainable development is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs^{***}. The policies in the NPPF constitute the Government's view of what sustainable development in England means in practice for the planning system.
- 2.13 To achieve sustainable development, economic, social and environmental gains should be sought jointly and simultaneously through the planning system. The planning system therefore has to perform a number of roles to support the *"three dimensions"* of sustainable development (paragraph 7):
- **an economic role** – contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation;

^{††} In development plan documents adopted in accordance with the Planning and Compulsory Purchase Act 2004 or published in the London Plan.

^{§§} Unless other material considerations indicate otherwise.

^{***} Resolution 42/187 of the United Nations General Assembly definition.

- **a social role** – supporting strong, vibrant and healthy communities, by providing the supply of housing required to meet the needs of present and future generations; and by creating a high quality built environment, with accessible local services that reflect the community's needs and support its health, social and cultural well-being; and
- **an environmental role** – contributing to protecting and enhancing our natural, built and historic environment; and, as part of this, helping to improve biodiversity, use natural resources prudently, minimise waste and pollution, and mitigate and adapt to climate change including moving to a low carbon economy.

2.14 The NPPF constitutes guidance for local planning authorities and decision-takers both in drawing up plans and as a material consideration in determining applications (see Text Box).

For **plan-making** this means that:

- local planning authorities should positively seek opportunities to meet the development needs of their area;
- Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
 - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
 - specific policies in this Framework indicate development should be restricted^{†††}.

For **decision-taking** this means^{†††}:

- approving development proposals that accord with the development plan without delay; and
- where the development plan is absent, silent or relevant policies are out-of-date, granting permission unless:
 - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
 - specific policies in this Framework indicate development should be restricted (as for plan-making).

2.15 The NPPF states (paragraph 15) that policies in Local Plans should follow the approach of the presumption in favour of sustainable development so that it is clear that development which is sustainable can be approved without delay. All plans should be

^{†††} For example, those policies relating to sites protected under the Birds and Habitats Directives (see paragraph 119) and/or designated as Sites of Special Scientific Interest; land designated as Green Belt, Local Green Space, an Area of Outstanding Natural Beauty, Heritage Coast or within a National Park (or the Broads Authority); designated heritage assets; and locations at risk of flooding or coastal erosion.

^{††} Unless material considerations indicate *otherwise*

based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally.

Core Planning Principles

2.16 Within the overarching roles that the planning system ought to play, the NPPF (paragraph 17) sets out 12 core land-use planning principles should underpin both plan-making and decision-taking. These principles include the following and state that planning should:

- be genuinely plan-led, empowering local people to shape their surroundings, with succinct local and neighbourhood plans setting out a positive vision for the future of the area and providing a practical framework within which decisions on planning applications can be made with a high degree of predictability and efficiency;
- not simply be about scrutiny, but instead be a creative exercise in finding ways to enhance and improve the places in which people live their lives;
- proactively drive and support sustainable economic development. Plans should take account of market signals and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of the residential and business communities;
- always seek to secure high quality design and a good standard of amenity for all existing and future occupants of land and buildings;
- take account of the different roles and character of different areas, promoting the vitality of our main urban areas, protecting the Green Belts around them, recognising the intrinsic character and beauty of the countryside and supporting thriving rural communities within it;
- support the transition to a low carbon future in a changing climate, taking full account of flood risk and coastal change, and encourage the reuse of existing resources;
- contribute to conserving and enhancing the natural environment and reducing pollution;
- encourage the effective use of land by reusing land that has been previously developed (brownfield land), provided that it is not of high environmental value;
- promote mixed use developments, and encourage multiple benefits from the use of land in urban and rural areas, recognising that some open land can perform many functions;
- conserve heritage assets in a manner appropriate to their significance;

- actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling, and focus significant development in locations which are or can be made sustainable; and
- take account of and support local strategies to improve health, social and cultural wellbeing for all, and deliver sufficient community and cultural facilities and services to meet local needs.

Plan-Making

Local Plans

- 2.17 The NPPF (paragraph 150) emphasises that Local Plans are *"...the key to delivering sustainable development that reflects the vision and aspirations of local communities"*. They should be *"aspirational but realistic"* and should set out the opportunities for development and clear policies on *"...what will or will not be permitted and where"* (paragraph 154). Only those policies that provide a clear indication of how a decision maker should react to a development proposal should be included in the plan.
- 2.18 Any additional development plan documents should only be used where clearly justified. Supplementary Planning Documents (SPDs) should be used where they can help applicants make successful applications or aid infrastructure delivery, and *"should not be used to add unnecessarily to the financial burdens on development"* (paragraph 153).
- 2.19 LPAs should seek opportunities to achieve each of the economic, social and environmental dimensions of sustainable development, and net gains across all three. The NPPF states that *"significant adverse impacts on any of these dimensions should be avoided and, wherever possible, alternative options which reduce or eliminate such impacts should be pursued. Where adverse impacts are unavoidable, measures to mitigate the impact should be considered. Where adequate mitigation measures are not possible, compensatory measures may be appropriate"* (paragraph 152).
- 2.20 The NPPF (paragraph 156) requires **strategic priorities** for the area covered by the Local Plan to deliver, *inter alia*, the homes and jobs needed in the area; the provision of retail, leisure and other commercial development; and the provision of health, security, community and cultural infrastructure and other local facilities.
- 2.21 Crucially the NPPF (paragraph 157) indicates that Local Plans should, amongst other key requirements:
- Plan positively for the development and infrastructure required in the area to meet the objectives, principles and policies of the Framework;
 - be drawn up over an appropriate time scale (preferably 15 years), take account of longer term requirements and be kept up to date;

- indicate broad locations for strategic development on a key diagram and land-use designations on a proposals map;
- allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate; and
- identify land where development would be inappropriate, for instance because of its environmental or historic significance.

Using a Proportionate Evidence Base

- 2.22 The Framework states LPAs should ensure that the Local Plan is based on "*adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area*" (paragraph 158) and that their assessment of, and strategies for housing, employment and other uses are integrated, and take full account of relevant market and economic signals.
- 2.23 For business, LPAs should have a clear understanding of needs within the economic markets operating in and across the area. To achieve this the NPPF states that LPAs should work together with county and neighbouring authorities and with Local Enterprise Partnerships (LEPs) to "...prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market" (paragraph 160). They should also work closely with the business community to understand their changing needs and identify and address barriers to investment.
- 2.24 The NPPF (paragraph 161) states that LPAs should use this evidence base to assess:
- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
 - the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs. Reviews of land available for economic development should be undertaken at the same time as, or combined with, Strategic Housing Land Availability Assessments (SHLAA) and should include a reappraisal of the suitability of previously allocated land;
 - the role and function of town centres and the relationship between them, including any trends in the performance of centres;
 - the capacity of existing centres to accommodate new town centre development;
 - locations of deprivation which may benefit from planned remedial action; and
 - the needs of the food production industry and any barriers to investment that planning can resolve.

DEVELOPMENT PLAN CONTEXT & POLICIES

2.25 The following section briefly reviews the local Development Plan Documents (DPDs) relevant to the preparation of this study, along with any other relevant regeneration and strategy reports recently prepared by the Council. In this case the adopted development plan comprises the East of England Regional Spatial Strategy (May 2008), the Adopted *Core Strategy* (May 2011, updated April 2011 following a successful High Court Challenge which removed the majority of Policy CS7 relating to housing distribution) and Saved Policies of the December 1995 *Forest Heath Local Plan* ('FHLP').

East of England Regional Spatial Strategy

2.26 As described previously, although the Government's stated intention is to abolish RSSs, in the case of Forest Heath the East of England RSS requirements have already been incorporated in the adopted Core Strategy (CS). The Council has resolved to review its overall housing requirements and is currently undertaking a review of its evidence base (Core Strategy Single Issue Review).

2.27 In the RSS, Newmarket forms part of the Cambridge sub-region. The RSS identifies nine regional centres (including Cambridge, Ipswich and Norwich) and eleven major town centres (including Bury St Edmunds and King's Lynn) in the region. No centres in Forest Heath are referenced in the regional hierarchy.

2.28 The RSS directs Local Development Plan Documents to provide for development focused on making the most of land in the following order of preference:

- the built up areas of Cambridge, followed by the periphery of Cambridge on land released from the Greenbelt;
- at the new settlement of Northstowe; and
- on land within or on the peripheries of the sub-region's market towns (e.g. Newmarket, Brandon, and Mildenhall) and within key service centres or the peripheries of key service centres (e.g. Lakenheath and Red Lodge) where such development would contribute to the social and economic needs of the community (Policy CSR1).

2.29 The East of England RSS also sets a requirement for Forest Heath District to deliver 6,400 homes by 2021 (Policy H1). Policy CS7 of the Adopted Core Strategy brought forward this requirement, however it is currently being reviewed (Core Strategy Single Issue Review). The allocation of sites will be identified in the emerging Site Allocations Document.

Suffolk Structure Plan (2001)

- 2.30 The Structure Plan as a whole ceased to be a part of the Development Plan on 26th September 2007, however 11 policies were saved by the Secretary of State until replacement by the Local Plan. No policies were subsequently replaced by the Adopted CS and they therefore remain in force.
- 2.31 The only policy relevant to retail and town centre uses is limited to ECON11, which states that proposals for new community facilities (including convenience shops) in keeping with the character and scale of villages will be encouraged where there is no material conflict with residential amenity or with policies for transport or protection of the environment.

Local Plan (Adopted 1995)

- 2.32 The Forest Heath Local Plan was originally adopted in 1995, with a number of policies 'saved' by the Secretary of State in September 2007. Although some of these 'saved' policies have now been superseded by the Adopted CS, the following remain relevant to retail, leisure and town centre uses:

- **Policy 5.14: Visitor Attractions (related to horse racing)** - broad promotion of the tourist potential of horseracing in Newmarket
- **Policy 7.5: Non-Retail Uses in Town Centres** - are generally acceptable as long as they do not result in any unacceptable decrease in the range of existing units, or an excessive proportion of non-retail uses in the town centre, and they are not detrimental to local amenity.
- **Policies 13.1, 13.2 & 13.3** – relate to the general expansion of and Masterplan for Red Lodge to accommodate new dwellings and a new main centre, together with appropriate smaller neighbourhood facilities. The overall gross area for retail (including A1, A2, and A3) uses is between 2-4 hectares (5-10 acres).

Core Strategy (Adopted May 2010)

- 2.33 The Core Strategy (CS) sets out the vision, objectives, spatial strategy and overarching policies for Forest Heath District, as well as guiding the provision of new development in the District up until 2031.
- 2.34 The **Spatial Vision** for the District reflects the main characteristics and key drivers for change in Forest Heath, and takes account of existing plans and strategies, to set out what kind of area Forest Heath should be in 2031. The overall vision and area-based visions have been prepared to provide a locally-specific spatial context. This has been derived through the identification of key issues and priorities during the consultations and community engagement undertaken in the various preparation stages of this document, including the priorities of the West Suffolk Local Strategic Partnership (LSP).

2.35 Of relevance to our study, the Core Strategy sets out several visions for both the District and its main centres.

2.36 **Vision 1** relates to the wider district and states:

"The market towns of Forest Heath will have a viable and vibrant retail offering with a range of local and national outlets offering a wide range of goods. Smaller centres will have a sufficient retail offer to accommodate the needs of their respective local catchments".

2.37 **Vision 2** relates to Newmarket specifically:

"Newmarket will remain the largest town in the District. Newmarket's position as the international home of horse racing will be preserved and enhanced. It will have been positioned and promoted further as both a destination for tourists and businesses, and as a hub from which the rich and distinct historic context of the district, its cultural attractions and environment can be enjoyed. Its facilities and retail offerings will have been developed and expanded. A broader range of employment, services and facilities will be available, to capitalise on its strategic location within the region and locality."

2.38 **Vision 3** relates to Mildenhall and envisions that:

"Mildenhall will have a vibrant town centre with a broad range of shops and services meeting the needs of the wider catchment. New development will have enhanced the appearance, character and function of the town and aided regeneration, while ensuring the needs of the community are met."

2.39 **Vision 4** for Brandon is that:

"Brandon will have reinforced itself as the gateway to the Brecks [...]. The tourism industry will grow and the area will be known as a place to visit and enjoy countryside and tourism as its best. [...] The market town will become increasingly self-sufficient, meeting the needs of the local community with residential and employment growth. The town centre will be revitalised, providing job opportunities and achieving a high quality settlement with an improved image of the town and its attractiveness as a tourist destination."

2.40 **Vision 5** for Lakenheath states:

"Lakenheath will perform more strongly as a key service centre, with enhanced retail and service provision and jobs to meet the needs of its catchment population. New sport and recreation provision will have been made, together with enhanced community facilities and services to meet the needs of the local population and sports clubs. The fen and heath land qualities of the surrounding countryside will continue to be protected and enhanced."

2.41 **Vision 6** for Red Lodge is that:

"Red Lodge will become a sustainable location and will be developed to provide a variety of jobs, shops and community services and facilities to cater for the planned population growth, and to enhance its ability to provide for the needs of the surrounding villages. The large brownfield capacity will be built upon prior to further Greenfield development taking place and the foul drainage issues will have been addressed."

- 2.42 **Vision 7** relates to the villages of Beck Row, Exning, Kentford and West Row and states that:

"The villages of Beck Row, Exning, Kentford and West Row will continue to be reliant on nearby Mildenhall and Newmarket for employment and a greater range of shops, services and facilities. However, the villages will also have retained and broadened their services and facilities where opportunities arose. Additional housing and employment opportunities will have been provided within settlements and through small settlement expansions which meet local needs."

- 2.43 The Core Strategy also sets out a number of **Spatial Objectives** deriving from the priorities set out in the vision for the District.

- 2.44 **Spatial Objective ECO 4** is particularly relevant to this study and states:

"To deliver urban regeneration projects in Brandon, Mildenhall and Newmarket to develop and support thriving service centres in our market towns including appropriate retail development and provision of community and leisure services in order to reduce leakage of expenditure on these services and to centres outside the District."

- 2.45 **Policy CS1** is the spatial strategy for the district and sets out a broad indication of the overall scale of development. The spatial hierarchy is comprised of

- the three **Market Towns** of Newmarket, Brandon and Mildenhall - The CS states (paragraph 2.5.9) that (to be in general conformity with the RSS) the highest proportion of new development should be directed to these market towns to serve *"the retail and leisure needs of the local catchment area"* (Policy CS1).
- the **Key Service Centres** of Lakenheath and Red Lodge (the latter upon completion of the village centre) - The services and facilities expected include: *"...some if not all of: a convenience shop, public transport, health care, primary school and access to employment opportunities. It is considered that only Lakenheath currently has all of these services, Red Lodge will have these services when the agreed Red Lodge Master Plan has been fully implemented and the village centre and primary school have been delivered"* (paragraph 2.5.8)
- four **'Primary Villages'** - Development will be: *"dependent upon the appropriateness of the site and the capacity of the village to accommodate growth"*

and will be designated to meet local needs to support rural sustainability" (Policy CS 1).

- ten '**Secondary Villages**' - Development will be limited to nominal housing growth, with no growth envisioned for the District's smaller settlements outside of where local capacity allows.
- 2.46 RAF Lakenheath and RAF Mildenhall are identified separately as **Sustainable Military Settlements**. Their growth will be "*restricted to operational need including necessary related facilities*" (Policy CS 1).
- 2.47 Section 3 covers the '*Retail and Town Centre Strategy*' for Forest Heath and the relevant policy is **Policy CS 11**. The scope and benefits of further retail development in Forest Heath have been informed by the Council's 2006 *FHDC RTCS*, which forms the evidence base for the Core Strategy. Paragraph 3.10.2 states that the three market towns and two key service centres have (and in the case of Red Lodge, 'will have') centres which serve their "*local surrounding catchment areas*". Policy CS 11 supports maintaining and enhancing the vitality and viability of these centres in the hierarchy. The Core Strategy specifically sets out a requirement for
- 4,500 sqm net of new convenience goods floorspace and 10,500 sqm net of comparison goods floorspace in Newmarket;
 - 1,500 sqm (net) in Mildenhall; and
 - 600 sqm (net) in Brandon.
- 2.48 These requirements are broadly in line with the recommendations set out in the 2006 study. This identified capacity for 14,145 (net) in Newmarket; 1,547 sqm (net) in Mildenhall; and 591 sqm (net) in Brandon.
- 2.49 Policy CS 11 seeks to build on existing attractions in Newmarket and states that "*the town's international cultural reputation as the headquarters of horse racing will be developed and links between leisure facilities and retail or other town centre facilities will be improved*". The CS also states that the scale of growth proposed for the three market towns "*reflects their importance within Forest Heath and their wider positions within Suffolk and the East of England*" (paragraph 3.10.5). The identified floorspace growth aims to recover some of the expenditure 'leakage' outside the District as identified by the 2006 *FHDC RTCS*. Policy CS 11 states that developments that cumulatively exceed these levels may still be approved: "*...provided that qualitative benefits result or it can be demonstrated that such development assists in clawing back leakage of expenditure that would be expected to support that centre*".
- 2.50 With regard to the *Key Service Centres* the CS (paragraph 3.10.4) states that they should "*retain their role as large village centres*". **Policy CS 11** states that, to support this objective, the Council will:

- ensure that the importance of shops and services to the local community is taken into account in assessing proposals which will result in their loss or change of use, the Council will resist the loss of shops and services which are deemed to be important to the community;
- respond positively to proposals for the adaptation and/or extension of shops that will improve the long term viability of their existing primary function but does not result in their loss or change of use; and
- Promote and support new retail provision within the Key Service Centres, *"appropriate to their scale and role as 'local centres'".*

2.51 The Core Strategy recognises the importance and benefits of the District's key attractions and features of the District's economy. **Policy CS 6** confirms that *"support will be given to developing and sustaining Forest Heath's existing economy with particular priority given to key sectors including the equine industry around Newmarket, the air bases of Mildenhall and Lakenheath, Centre Parcs and tourism, and agriculture and forestry."*

Emerging Policy Documents

2.52 The Council is currently in the process of preparing the remainder of its Local Plan Documents, which will include Site Specific Allocations and Development Management Policies Development Plan Documents (DPDs).

Site Specific Allocations DPD

2.53 The *Site Specific Allocations* (SSA) DPD will identify which sites should be developed in Forest Heath and its main centres in order to achieve the visions and objectives of the Core Strategy. It will include proposals for new housing, employment, shopping and other development, together with other uses of land such as parks and open spaces.

2.54 The Council undertook consultation on an *Issues and Options* version of the *SSA DPD* (ending 18th December 2006) and consultation on the final *Issues and Options SSA* was scheduled for June-July 2010 to 30th July 2010. However, following the announcement by the Coalition Government on 27th May of its intention to abolish the Regional Spatial Strategies (RSS), the Council resolved to *'...instruct Officers to undertake an immediate review of the housing targets and strategic land allocations which arise from the growth numbers (in the RSS)'* (Full Council, 12th May 2011).

2.55 Against this background, the Council have delayed work on the *SSA* while it is reviewing its evidence base and to undertake a Core Strategy Single Review for Policy CS7: Overall Housing Provision and Distribution. According to the newly Adopted Local Development Scheme (LDS) (January 2012), publication of the Regulation 18 *Issues and Options SSA DPD* is timetabled for December 2012, with Adoption expected in 2015.

Development Management Policies DPD

- 2.56 The Development Management Policies (DMP) DPD will set out policies for managing development in the District. Consultation on the first stage of the DMP DPD concluded in March 2012. Consultation on the Proposed Submission Publication is timetabled for July 2012, with Adoption expected in August 2013.

SUMMARY

- 2.57 National, regional and local planning policy is in a "*state of flux*" and could be subject to considerable review and reform over the next 12-18 months. Notwithstanding this, the Coalition Government has set out its commitment to promote new development and investment in town centres 'first', balanced with opportunities for new out-of-centre retail and leisure development where this does not result in significant negative impacts on key policy tests.
- 2.58 The Adopted Core Strategy sets out a clear spatial hierarchy for the District's centres. It recognises the important role of Newmarket as the largest market town in the District and the potential the benefits retail, leisure and town centre uses which could accrue from the equine industry and the town's status as the "home of horse racing".
- 2.59 Brandon and Mildenhall are described as smaller market towns and development is proposed to enhance and support their ability to serve their surrounding catchments and support their roles in the District's retail hierarchy.
- 2.60 Lakenheath and Red Lodge are identified as Key Service Centres (the latter, upon completion of the village centre) and serve a more local role for the immediately surrounding catchment areas.
- 2.61 The classification of the District's different centres in terms of their scale and function provides a framework for new investment and development.

3.0 THE CHANGING URBAN, RETAIL & LEISURE LANDSCAPE

- 3.1 Britain's urban, retail and leisure landscape has changed dramatically since the 1980s. The changes in the location of new retail and leisure development and the dynamic shifts in the nation's shopping and leisure habits have been shaped by the complex interaction of policy, economic, social, consumer lifestyle and investment trends.
- 3.2 This section summarises some of the key trends that have driven change in the retail and leisure sectors over the last three decades, and will continue to shape change in the future. The more detailed research that informs this section is set out in **Appendix 9** for the retail sector and **Appendix 10** for the commercial leisure sector.

THE RETAIL SECTOR – KEY TRENDS

Economic Trends

- 3.3 Following an unprecedented period of growth in consumer spending since the mid-1990s, the onset of the economic recession in 2007 has had an equally dramatic impact on household budgets, consumer spending, market demand and, as a result, the level and extent of new development.
- 3.4 The table below summarises Experian's latest recorded and forecast expenditure per capita growth rates for the main categories of retail spending between 2005 and 2028.

Table 3.1 Growth in UK Retail Spend per Head (% change), 2005 - 2028

	Recorded Growth						Forecast Growth				
	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014-18	2019-28
Retail Spend	1.7	2.6	1.9	2.0	-1.1	0.3	0.2	0.9	1.6	2.2	2.3
Retail Spend (excl SFT)*	1.5	2.3	0.9	0.3	-2.8	-1.3	-1.3	-0.5	0.4	1.8	2.3
Convenience Goods:	0.1	-0.2	0.4	-1.4	-2.4	0.8	-0.3	-0.4	0.5	0.5	0.6
Comparison Goods	2.7	4.5	2.7	3.9	-0.5	0.1	0.5	1.6	2.1	3.0	3.0
Consumer Spend	1.7	1.2	1.4	0.0	-2.9	0.5	-0.9	0.5	1.5	1.8	1.8

Source: Experian *Retail Planner Briefing Note 9* (September 2011) Figures 1a and 1b. Also see **Appendix 9**

Note: *This forecast excludes special forms of trading and provides an indication of forecast growth from physical outlets only.

- 3.5 The latest expenditure forecasts by Experian Business Strategies (EBS) show limited growth of retail and leisure expenditure per head over the short term. Experian forecast that per capita growth rates will be lower than historic trends for a number of inter-related factors including the increasing maturity of the UK economy; less expansionary consumer credit; greater emphasis on green issues (including higher

energy costs); and an ageing population. As a result, average comparison goods retail spending growth of +3.0% per annum for the period 2014-2028 is significantly lower than growth rates based on historic trends of around +6.0%. For convenience goods the difference between the forecasts and historic trends is not as marked.

- 3.6 Although the latest forecast growth rate for convenience goods is similar to the +0.7% per annum used in the previously *2006 Retail Study*, it is significantly lower than the +4.3% forecast for comparison goods assumed in the *2006 Retail Study*.
- 3.7 The retail market therefore remains fragile. Analysts forecast that the retail sector will continue to struggle over the short to medium term. Business and consumer confidence has been weakened by a range of factors including the Comprehensive Spending Review; the rise in VAT in January 2011; increasing unemployment; and the rising cost of living (including higher energy costs and the growth in inflation). This has effectively reduced disposable income. At the same time retailers' margins are being squeezed further as the downturn persists.

Development Trends

- 3.8 The economic downturn has also impacted on the retail development pipeline, which has slowed substantially compared with the shopping centre "boom" witnessed over the last decade.
- 3.9 One of the key effects has been to "*flush out*" some of the more expensive and risky development schemes that were in the pipeline in 2006/07. As a result the shopping centre floorspace pipeline is at its lowest level since the 1990s. For example, only three schemes opened in 2011 and the majority of the new floorspace was dominated by Westfield in Stratford City. Looking ahead, there is very little new floorspace scheduled to open in 2012 and 2013, apart from the redevelopment and extension to Trinity Shopping Centre in Leeds.
- 3.10 As a result, many of Britain's towns that were set to benefit from much needed new retail-led investment and regeneration over the next 5 years may now have to wait several years before confidence and investment returns. Even then, the scale and type of new investment that will emerge in the post-recessionary period could be very different to the last decade of development.

Operator Demand

- 3.11 Retail operators have been quick to respond to changes in customer requirements, legislation (including extended opening hours and Sunday trading) and planning policy over the last 10-20 years.
- 3.12 Some of the most dynamic changes over the last decade have been driven by the major grocery operators. The key trends have included:

- a 'return' to the high street – which has resulted in the growth of smaller store formats such as Tesco 'Metro' and Marks and Spencer's 'Simply Food' that do not generally require car parking. At the other end of the development spectrum has been the growth in larger foodstore 'anchors' that help to generate footfall and expenditure;
 - the growth of the smaller convenience store formats - for example, Tesco has opened over 2,000 'Express' stores and Sainsbury's has also developed its 'Local' format. More recently, Morrisons has announced that it will be opening 3 'M-Local' stores which, if successful, could be rolled out across the country. Similarly, Waitrose and Asda are also looking to increase their convenience store offer.
 - the growth of European 'deep discount' food operators – Aldi and Lidl have increased their market share over the last ten years. The established grocery retailers have responded through their own-range 'value' products.
 - the increase in non-food sales – this has included more own-label clothing and electrical goods being sold from foodstores. This has largely driven the increase in applications for extensions and/or mezzanines, along with the growth of larger store formats (such as Tesco Extra).
- 3.13 Non-food retailers have also experienced significant growth since the 1990s, but are now having to adapt to the very different market conditions. Those retailers that are not flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high end and value retailing, have largely been the retailers that have struggled to maintain market share over recent years and, in some cases, have disappeared from the retail landscape (e.g. Woolworths).
- 3.14 The bulky goods retail warehouse sector has experienced a period of significant change and, more recently, instability. B&Q ('Warehouse') and Homebase have developed very large 'category killer' out-of-centre retail warehouses (some exceeding 10,000 sqm gross), but more recently they have scaled down their stores. Following the acquisition and then subsequent sale of Do It All, Great Mills and Wickes, Focus DIY announced it would be going into administration in May 2011, meaning the end of one of the UK's major DIY operators.
- 3.15 Within town centres, some high street multiple comparison retailers have also changed their formats and are increasingly seeking larger modern shop units. Some traditional high street retailers (e.g. Boots, Next, TK Maxx and Marks & Spencer) have sought this space in large, out-of-centre stores which provide the space they require to display their full range of products. Mothercare has recently announced plans to close 110 of their town centre stores (representing approximately a quarter of their portfolio) to focus on their out-of-centre stores.

- 3.16 This is resulting in an increasing polarisation of activity into the larger regional and sub-regional centres (the top 100 centres) which can accommodate the demand for larger modern floorspace, at the expense of smaller and medium sized centres. The continuation of these trends could also impact on future operator requirements, with retailers looking to satisfy their demand for larger premises in new larger shopping centres which benefit from wider catchment areas.

Internet Shopping

- 3.17 New forms of retailing have also emerged in recent years and are becoming established as significant alternatives to more traditional shopping facilities. In particular, Internet shopping (e-retailing) has increased its market share of retail sales in certain product categories due to the increased use of personal computers and faster Broadband access. Although forecasters are still uncertain as to the future growth in Internet shopping and the likely impact on the capacity for new retail floorspace (for example, EBS forecast a plateau in market share by 2018), it is nevertheless clear that home shopping will continue to impact on the need for 'physical space' in centres. Up to now, the impact of Internet shopping on certain retail products and services, such as books, music and travel, has resulted in a reduction in the number of retailers selling these types of products on the high street. The wider impact of e-retailing will also have implications for the tenant mix of future new shopping schemes.

THE COMMERCIAL LEISURE SECTOR – KEY TRENDS

- 3.18 Leisure uses^{§§§} make an important contribution to the vitality and viability of town and shopping centres by providing complementary uses that contribute to both the daytime, early evening and night-time economies.
- 3.19 The trends that are shaping the commercial leisure sector are described in more detail in **Appendix 10**. The following is intended to provide a brief summary of some of the more salient issues that are relevant to the assessment of existing and potential commercial leisure provision in the District and its main centres.

Development Trends

- 3.20 Like retailing, the commercial leisure sector has also enjoyed significant growth since the early 1990s, fuelled by buoyant market conditions, growing levels of disposable incomes and low unemployment. The 1990s was generally characterised by the expansion of major leisure parks, usually anchored by large multiplex cinemas and

^{§§§} Commercial leisure uses are defined here as comprising cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres and bingo halls.

offering a range of other facilities, such as tenpin bowling, bingo, nightclubs, health/fitness clubs, themed destination restaurants, pub/restaurants, children's nurseries and budget hotels. Most of the early leisure developments were on the edge of town centres or in out-of-centre locations, including extensions to retail warehouse parks. However, the tightening of planning policy has resulted in leisure facilities and specifically cinemas being integrated into town centre mixed use developments.

Multiplex Cinemas

- 3.21 Cinemas are now viewed as important anchors to shopping and town centres, providing footfall for other uses outside of shopping hours and helping to create vitality and viability. However, growth in this sector has slowed significantly in recent years with many areas reaching saturation levels. This notwithstanding, research shows that although the development of large multiplex cinemas is falling, there could be a growth in the number of new digital cinemas to serve smaller catchment areas. These digital cinemas are more flexible and less "space-hungry" as they do not require the large sloping auditoriums needed to accommodate projectors. There are therefore opportunities for the modern cinema offer to be provided in existing buildings. For example, HMV is currently testing a three screen art-house format above its Wimbledon music store, which is currently in operation and appears to be doing well, albeit there appear to be no plans to expand the operation to other stores. Over the short to medium term, future cinema developments are likely to be impacted by the level of availability of finance for property developers, although it would appear that investment in better seating, better bars and cafés and new buildings is continuing.

Health & Fitness Sector

- 3.22 Other sub-sectors of the commercial leisure industry have performed relatively well over the last decade and have expanded rapidly across different locations. For example, the private health and fitness market is well established and a number of multiple operators are still actively seeking premises across the UK (e.g. LA Fitness and Fitness First). Although the health and fitness sector is also reaching saturation point in some areas, there is evidence that a number of new 'budget' operators are entering the health and fitness market and are actively looking to expand their businesses throughout the UK. This new breed of clubs aims to appeal to a wider market with reduced monthly subscriptions. For example, the US business '*Anytime Fitness*' is currently looking for busy town centres in which to open its 24-hour gyms, Although these new breed of clubs provide a basic offer, they do appear well suited to the financially uncertain times.

Eating & Drinking Out

- 3.23 Finally the recession has had an impact on the restaurant, pub and nightclub sectors as more households choose to '*stay at home*'. This has resulted in greater competition

amongst operators in terms of price, particularly those that operate in the 'middle ground' (e.g. Pizza Express). On the other hand, it has also fuelled the growth of takeaway operators (such as Domino's Pizza).

TOWN CENTRE FUTURES

3.24 Forecasters are uncertain as to when the UK will emerge fully from the economic recession. However, it is clear that the economy and retail sector post-recession will be very different to the "boom" years of the last decade. The economy is forecast to face a period of

- lower growth in consumer spending;
- reduced bank lending;
- limited access to credit;
- cuts in public sector expenditure; and
- a sluggish housing market.

3.25 This presents significant challenges for all those involved in the retail sector, from operators through to investors and developers. The economic downturn is also impacting on the vitality and viability of many of Britain's centres and high streets, through the loss of customers and new public/private sector investment. This is placing pressures on rental growth and market demand in many centres outside the "top 100" shopping locations. This is further compounded by rising vacancy levels and the loss of key "anchor" retailers.

3.26 In our opinion, a far more uncertain future awaits the next "wave" of new retail floorspace development proposals. The evidence suggests that high quality schemes in the strongest shopping locations will continue to prosper, whereas those in weaker locations with more limited catchments and limited market demand will struggle over the short to medium term. However, notwithstanding this reduction in the supply of desirable sites, demand for floorspace will continue as it remains the primary mechanism for retailers to grow their businesses. Without a selection of suitable sites, retailers will be forced to look at alternative options for delivering growth, such as locating in retail warehouse parks, branching out onto the internet, and/or expanding internationally. There has also been an increasing tendency for developers to refurbish/ reconfigure existing shopping centres to attract additional stores, as this is generally less risky and costly than developing new facilities.

3.27 The erosion of consumer confidence and retail spending over the last two years has resulted in difficult trading conditions for many national and independent retailers and commercial leisure operators. The economic recession initially exposed those operators saddled with bad debts and weak profit margins. Although the number of business failures slowed during 2010, a new round of more high profile business failures

occurred in 2011 including Focus DIY, Habitat, Jane Norman, TJ Hughes and HomeForm kitchen Group. At the same time, Mothercare has announced its intention to close over 100 of its high street shops to focus on its out-of-centre retail outlets. Comet has also been put up for sale by its French owners. Together, these changes will have negative impacts on the vitality and viability of many of Britain's more "*fragile*" high streets and secondary shopping locations that are currently struggling to fill vacant units.

- 3.28 Notwithstanding this, the market demand from grocery retailers for new store formats of all sizes, alongside extensions to existing stores, has not slowed dramatically during the current economic downturn. Indeed, many operators are reporting growth in like-for-like sales and are still promoting new store development and extension programmes. Coupled with the Government's intention to promote sustainable development and economic growth, it is likely that planning applications for different types of retail formats in town centre, edge-of-centre and out-of-centre locations will be maintained and may even increase over the short to medium term.
- 3.29 The positive benefits of planning for 'anchor' foodstores on sites that are within or well connected to primary shopping areas is becoming increasingly accepted. Recent research by the University of Southampton has found that:
- Supermarkets built on the edge of town centres encourage significantly fewer local residents to leave those towns for their main food shopping.
 - The new supermarkets are not just being used for 'one-stop' shopping, but are increasing footfall and urban 'buzz' across centres through linked trips and are helping to maintain and enhance town centre vitality and viability.
 - The new supermarkets encourage a significant decrease in car usage and increase in walking on main food shopping trips amongst local residents.
 - A year after the opening of the new supermarkets two-thirds of consumers believed the new stores were beneficial to themselves, local residents and the town centre. Only 8% believed otherwise.
 - Feedback from traders was consistently positive about the new supermarkets' impact on local residents and the town centre. Contrary to popular opinion, traders also took a generally positive or neutral view on the impact on their own businesses.
 - Detailed study of changes in retail composition of eight case study centres provides little support for widely held views linking supermarket development to the decimation of existing centres and their retail diversity.
- 3.30 At the same time, grocery retailers are also looking to increase their market share of online sales and many are now opening warehouses to purely serve Internet shopping.

However, at this early stage, it is difficult to predict the likely impact of “virtual” sales on operator demand for new “physical” space.

- 3.31 Over the short to medium term any increased demand for space from retailers will have to be met by the current retail stock (i.e. existing shopping centres, the high street and out-of-centre facilities), as there is limited new retail floorspace in the pipeline. Recent research by the British Council of Shopping Centres (BCSC) predicts that this mismatch between demand and supply will effectively ‘push up’ rental levels for the larger modern desirable units until a significant amount of new development reaches completion. As a result, over the medium term, retailers will be competing for limited available space. Therefore those centres that are able to accommodate and deliver new developments over the next 5-10 years should be in a good position to attract operator interest. However, this will depend on the new retail floorspace being in the right location (i.e. prime) and having the right size, format and specification to meet the needs of modern retailers.
- 3.32 Although planning policy promoting development and investment in town centres “first” has been reinforced by the NPPF, it is likely that applications to extend and “refresh” existing out-of-centre shopping locations will continue as an integral part of the business and asset management strategies of operators and funds. Potentially the next phase of out-of-centre investment and development could be a further reinvention and masterplanning of existing out-of-centre locations as mixed use developments, comprising residential, office and commercial leisure uses in addition to the existing and extended retail offer. The potential opportunities to “reinvent” out-of-centre shopping locations will be greatest initially where they are located close to towns that do not have the physical capacity (i.e. sequential sites) to increase their retail offer.
- 3.33 As the country emerges from the worst “ravages” of the economic recession, it is clear that there are many cities and towns in Britain that need the injection of new investment, development and regenerations in order for them to compete and move forward. Without this commitment, then the ‘worst case’ scenario is that the weaker medium and smaller-sized centre will simply “whither on the vine”.

4.0 STUDY (CATCHMENT) AREA

- 4.1 The 'catchment' area defined for the June 2006 *'Retail & Town Centre Study'* was broken down into 10 sub-zones, and was supported by a total of 1,000 household telephone interview surveys. The previous area covered a wider geographic area than just the local authority in order to take account of the wide-ranging choices and travel patterns for food, non-food, leisure and other town centre uses and facilities.
- 4.2 We consider that the previous study area remains reasonable and appropriate in the context of the present study. We have therefore replicated these zones. The exact extent of each zone may have changed slightly where postcodes have been modified, however, the study area remains largely the same as that assessed in 2006.
- 4.3 The market share analysis and economic capacity assessment has been assessed on a zone by zone basis, however, for reporting purposes we have grouped the zones into three key areas. The 'Core Catchment Area' (CCA) comprises Zone 1 – 3 and covers Forest Heath District Council, including the three main town centres of Newmarket, Brandon and Mildenhall, as well as all local centres.
- 4.4 The 'Secondary Catchment Area' (SCA) is comprised of Zones 4 & 10, both of which largely fall outside of the District boundary. The SCA consists of those areas where the results of the household survey indicate that a smaller amount of trade is drawn to the District's town centres. It includes Ely, and the area immediately surrounding Downham Market, as well as several smaller local towns and villages.
- 4.5 The 'Outer Catchment Area' (OCA) is comprised of Zones 5 – 9, which radiate concentrically around the CCA and part of the SCA. The OCA accounts for a much more limited amount of the District's trade in-flow. It comprises the competing centres of Bury St. Edmunds, Haverhill, and part of Thetford.
- 4.6 A plan of the catchment area can be found in **Appendix 1**.

5.0 THE SUB-REGIONAL HIERARCHY

- 5.1 This section briefly considers the role and attraction of centres in neighbouring authority areas and across the wider sub-region. This analysis provides an overview of the broad influence of these centres on the current and future role of Forest Heath District's main centres as shopping destinations.
- 5.2 This assessment draws principally on the results of the 2011 household telephone interview survey (HTIS) to determine current shopping preferences and patterns of those people living in the defined study area. Our assessment of the relative characteristics and strengths of the shopping provision in the main competing centres is also informed by a range of other data sources including, *inter alia*, Co-Star's retail and town centre Focus reports.
- 5.3 The market share and expenditure flow analysis informed by the results of the 2011 household survey has helped to identify the influence of nearby centres on the comparison goods shopping role of Forest Heath's main centres. Table 5.1 below compares the changes in the non-food market share (£ million and %) that competing centres draw from the study area in 2006 and 2011.

Table 5.1 Comparison Goods Market Share in Study Area, 2006 and 2011

	2006		2011	
	£m	%	£m	%
Cambridge	£161.6	21.2%	£136.7	16.9%
Bury St Edmunds	£155.6	20.4%	£326.6	40.4%
Newmarket (town centre)	£58.2	7.6%	£74.5	9.2%
Ely	£30.9	4.0%	£36.7	4.5%
Haverhill	£29.7	3.9%	£45.5	5.6%
Thetford	£24.5	3.2%	£70.7	8.7%
King's Lynn	£16.7	2.2%	£13.4	1.7%
Mildenhall	£5.8	0.8%	£8.7	1.1%
Sudbury	£2.7	0.4%	£2.4	0.3%
Brandon	£1.2	0.2%	£8.3	1.0%
Other	£275.1	36.1%	£85.1	10.6%
TOTAL:	£762.0	100.0%	£808.6	100.0%

Source: FHDC RTCS 2006 (Table 4.1) and 2011 Household Survey Results

Notes: Figures may not sum due to rounding.

- 5.4 The table shows that Cambridge and Bury St Edmunds continue to draw the highest proportion of comparison goods expenditure from the study area. Together these two key centres are achieving a market share in the study area of 57.3%, which is an

increase from the 41.6% combined market share recorded in 2006. Whilst trade drawn to Cambridge appears to have fallen by 4.3 percentage points from 2006, expenditure drawn to Bury St. Edmunds has almost doubled. This coincides with the opening of The Arc shopping centre in Bury St Edmunds 2009, which contributed an additional 60,400 sqm of retail floorspace to the town centre and brought in several new multiple retailers.

- 5.5 Newmarket is achieving the third highest market share in the study area, and has increased its comparison goods market share from 7.6% in 2006 to 9.2% in 2011. It continues to be ranked above Ely, Haverhill and Thetford in terms of its trade drawn from the study area.
- 5.6 The survey results confirm the more limited, local role of Mildenhall and Brandon as comparison goods shopping destinations. However both have experienced an increase in market shares within the study area.
- 5.7 The 10.6% of comparison goods expenditure going to 'other'**** centres and shopping locations in 2011 compares with 36.1% in 2006. This indicates that comparison goods expenditure is retained in a smaller geographic area than that observed in 2006, with competition among nearby centres increasing as they strive to increase market shares within a tightening catchment area.
- 5.8 Table 5.2 below sets out the changes in the national rankings of the key centres identified since 2005.

Table 5.2 National Centre Ranking, 2004-2010

	2005	2007	2009	Change
Cambridge	71	76	41	+30
King's Lynn	157	124	147	+10
Bury St Edmunds	204	210	216	-12
Haverhill	605	644	744	-139
Thetford	501	473	604	-103
Sudbury	352	320	340	+12
Ely	367	392	411	-44
Newmarket	374	374	405	-31
Mildenhall	1,438	1,626	1,754	-316
Brandon	1,960	n/a	n/a	-

Source: Javelin VenueScore

**** 'Other' locations will include out of centre facilities in Newmarket, smaller centres and local shopping facilities in and outside of the District and other retail warehouses and major centres in the region (principally Norwich and Ipswich).

Notes: The VenueScore Rank is based on the presence of multiple retailers, anchor stores, fashion operators and non-fashion multiples in centres and shopping locations. The score attached to each operator is weighted to reflect their overall attraction and likely impact on shopping patterns

- 5.9 The table shows that Cambridge, King's Lynn and Sudbury has strengthened their overall attraction and role in the sub-regional hierarchy since 2005. However, these results may now be dated as they will not take into account major new developments since 2009 (principally the Arc in Bury). Despite maintaining its rank at 374 up to 2007, Newmarket was ranked 405th in the national rankings in 2009, representing a fall of some 31 places from its previous ranking of 374th in 2007 and 2005. This is an indication that the scale, range and quality of Newmarket's shopping offer has not improved since at least 2005. Indeed, there is a risk that relative increases in the scale and quality of shopping offer in nearby competing centres may continue to decrease its ranking.
- 5.10 We briefly review the overall retail character, role and offer in the main centres below. Section 6.0 provides a more detailed assessment of Newmarket's vitality and viability based on the key performance indicators set out in the PPS4 *Good Practice Guidance*.

CAMBRIDGE

- 5.11 Cambridge is a key regional centre within the East of England Region and is located 21 km west of Newmarket, connected directly by the A14. As a major economic, social and cultural centre, it exerts a significant influence over the District.
- 5.12 The city includes a wealth of historic, cultural and retail activities. As well as serving as the main shopping and leisure destination for an extensive surrounding catchment area, it attracts over 4.5 million visitors each year.
- 5.13 The town centre is broadly arranged on a north-south axis along Bridge Street, Sidney Street and St Andrews Street. The historic centre includes a number of distinct sub-areas which offer an individual contribution towards the centre's overall offer.
- 5.14 The town centre has three main shopping centres, the Grafton Centre, The Lion Yard Shopping Centre and the newly built Grand Arcade.
- The **Grafton Centre** opened in 1983. It was extended in 1990's to include an 8-screen cinema and further extended in 2004. It currently comprises 42,800 sqm (gross). It is anchored by BhS and Debenhams and includes a number of multiples including Boots, New Look and Next.
 - The **Lion Yard Shopping Centre** is located within the historic core of the town centre and originally opened in 1974. It has circa 11,000 sqm (gross) and includes Dixons, Game and HMV. The Lion Yard Shopping Centre is located directly north of and connects directly to the new Grand Arcade Shopping Centre.
 - The **Grand Arcade** opened in March 2008 and is Cambridge's most recent addition to shopping provision in the historic part of the city. The 41,805 sqm

(net) centre has some 52 units (including All Saints, Hobbs Fossil, Apple, Kurt Geiger, La Senza, Laura Ashley, Hollister, Levi's, River Island, Schuh, Topshop, Swarovski, Ted Baker and Warehouse). The centre is also anchored by a 19,509 sqm (net) John Lewis.

- 5.15 In addition to its extensive town centre offer, Cambridge has a large quantum and range of convenience and comparison out of centre floorspace. This acts as a further 'bolster' to its relative attractiveness.
- 5.16 The city has several large stand-alone out-of-centre foodstores which serve a relatively wide catchment area, including at Bar Hill (Tesco Extra), Cheddars Lane (Tesco), Yarrow Road (Tesco), Coldham Lane (Sainsbury's), Trumpington (Waitrose), and Milton (Tesco). However the results of the household survey indicate that these stores do not attract a significant percentage of convenience goods expenditure from within the study area. Overall, they account for 2% of convenience goods expenditure within the CCA (the highest of which comes from Zone 2, which leaks only 4% of convenience goods expenditure to Cambridge). Convenience goods expenditure from the SCA (Zones 4 & 10) is also very low (0.9%), demonstrating the relatively 'tight' catchment areas for convenience food stores, irrespective of size.
- 5.17 Out-of-centre comparison goods floorspace in the Cambridge area is mostly concentrated in the Beehive Centre and Cambridge Retail Park, along with standalone units along Newmarket Road (including B&Q and Comet).
- The **Beehive Centre** opened in 1994 and is a purpose built retail park with large surface level car park located to the east of the city centre. The majority of units benefit from open A1 consent and main operators include Maplin, TK Maxx, Asda, Next Home, Pets at Home, Toys R Us, DW Sports Fitness, Carpet Right, Dreams Homestore & More.
 - **Cambridge Retail Park** opened in 2000 and is also a purpose built retail park with large surface level car park. It benefits from Open A1 consent and currently comprises Currys, PC World, Boots, Argos, Sports Direct, Burton/Dorothy Parkins, Halfords, Habitat, Furniture Village, Homebase, ScS, Pizza Hut and Starbucks.
- 5.18 Together, the results of the HTIS show that the comparison goods offer in Cambridge exerts a significant influence on comparison goods expenditure within the study area, accounting for 16.9% of total comparison expenditure within the study area. Looking more specifically at the zones comprising Forest Heath's CCA, it exerts the greatest influence over Zone 2 (accounting for 28.3% of total comparison goods expenditure), followed by Zone 1 (12.2%) with much lower draw from Zone 3 (3.5%).
- 5.19 With respect to further plans for growth and redevelopment that could have implications for Forest Heath's centres, outline planning permission was granted in April 2010 for the comprehensive redevelopment of the Station Area in Cambridge city centre to include 331 residential units, 1,250 student units, a polyclinic, 5,360 sqm of

B1 floorspace and 5,255 sqm of Class A floorspace. Bearing in mind the amount of new floorspace is relatively small in the context of existing retail/leisure floorspace, it is not considered that this will drastically increase the attraction of Cambridge as a retail/leisure destination. Notwithstanding this, it will help to maintain the momentum of change and growth in the centre that has seen its rise up the national rankings since 2005 and serve to enhance its strong attraction as a regional destination.

BURY ST. EDMUNDS

- 5.20 Bury St. Edmunds is located approximately 24 km east of Newmarket, 19 km south east of Mildenhall and 29 km from Lakenheath. It is designated as a *Major Town Centre* in the East of England Plan, and is one of the two main towns in St. Edmundsbury Borough (the other being Haverhill).
- 5.21 The town acts as a sub-regional centre, serving the needs of its extensive and largely affluent population, as well as acting as a destination for shopping and leisure activities outside of the Borough. The town provides a high quality shopping environment and offers a range of attractive shops and services.
- 5.22 The majority of Bury St Edmunds' retail provision is located in the defined shopping area, clustered around Cornhill and Butter Market. Over recent years major development west of St. Andrews Way, directly adjacent to the town centre, has served to significantly enhance the town centre's overall offer. This includes a 1,953 sqm (net) Waitrose and a number of retail units along Robert Bobby Way (including PC World, Best Buy and Halfords).
- 5.23 Since the previous study Bury St. Edmunds has benefited from significant major investment and development. A major extension in the form of the redevelopment of the former cattle market into a new shopping centre. The 'Arc' Shopping Centre opened in 2009 and includes a 7,897 sqm Debenhams' department store and 35 smaller shops (including H&M, HMV, L'Occitane, Monsoon, Next, New Look, Paperchase, Peacocks, River Island, Topshop/Topman, Waterstones, and Swarovski) together totalling 24,618 sqm of new retail floorspace. The town also benefited from the opening of a multiplex cinema development in 2005, which includes Frankie & Bennys, Tootsies, Subway and KFC.
- 5.24 It is therefore unsurprising that the relative attraction of the centre has increased and exerts a greater attraction to residents within the District, particularly bearing in mind the relative proximity of the town to many District residents. Whereas the 2006 survey showed Bury accounting for 20.4% of total comparison good expenditure within the study area, the results of the 2011 HTIS indicate this figure has almost doubled to 40.4%. Within the District's CCA, Bury St Edmunds accounts for 32.9% of total comparison goods expenditure, compared with 28.5% for Newmarket (combined town and out of centre). Although we do not have the most recent national rankings, we

anticipate that it will have improved its ranking since 2009 following the opening of The Arc.

5.25 In addition, the 2011 HTIS shows that approximately 8.3% of convenience goods expenditure is 'leaking' from the District to the following stores:

- Sainsbury's Bedingfield Way (circa 2%)
- Tesco, St. Saviours Interchange (circa 1.5%)
- Asda, Western Way (circa 3%)
- Waitrose, Robert Bobby Way (circa 1.7%)

5.26 Unfortunately the 2006 RTCS did not specify market shares for competing centres for convenience goods so it is not possible to compare any changes over time.

5.27 The Council is currently in the process of preparing Area Action Plans for both Bury St Edmunds and Haverhill to help guide and support investment in the two centres in the future.

ELY

5.28 Ely is designated as a market town in East Cambridgeshire District Council Core Strategy (October 2009) and is the largest settlement in the District. It is located approximately 22.5 km north of Newmarket along the A142, and 22.5 km west of Mildenhall. The town has grown rapidly in recent years following the development of new housing estates on the northern edge of the town.

5.29 Ely is relatively compact, with the main shopping area focused along the High Street, the pedestrianised Market Place and Cloisters Shopping Centre. The Cloisters opened in 1999 and is anchored by a 1,630 sqm (net) Waitrose and 1,360 sqm (net) Wilkinson. There are also approximately 20 additional smaller shops, which include a number of key high street multiple retailers, such as Iceland and Peacocks. The retail offer in the town centre is supplemented by a range of food and drink establishments, as well as a number of service providers.

5.30 The results of the 2011 HTIS show that Ely continues to account for an element of combined comparison expenditure within the entire Study Area (4.5%). This has gone up slightly from the 4.0% recorded during the 2006 RTCS.

5.31 Within the CCA, Ely accounts for 0.7% of total combined comparison goods expenditure. This is higher in the SCA (23.2%), which is unsurprising bearing in mind these zones are closest to Ely.

5.32 Since the 2006 study there have been several major retail applications in Ely, including:

- An application for a 4,314 sqm (net) Sainsbury's supermarket at the former Ely Chemical Company site on Lisle Lane, Ely which was approved 25th October 2010

(reference 09/00420/FUM). The store is currently under construction and should open in early spring 2012.

- An outline application on behalf of Aldi for the erection of two new retail units (one food and one non-food) on the Thurlow Nunn Standen Limited Site on Lisle Lane which was approved 14 November 2008 (reference 08/00571/FUM). Further to Sainsbury's recent approval, Aldi have submitted an application in September 2011 to amend conditions to the extant permission to allow for removal of the non-food unit and provision of a 1,570 sqm (net) foodstore on site (reference 11/0067/FUM). The application is pending determination.
- An application was submitted in October 2008 for a 1,525 sqm extension to the Tesco store at Angel Drove, however this was subsequently withdrawn in 2009. As far as we are aware there are no immediate plans to re-submit.

5.33 East Cambridgeshire District Council adopted the Masterplan for Ely in 23rd February 2010. The Masterplan contains future plans for:

- An expansion of the city centre to maximise the potential of opportunity sites to provide additional shopping floorspace;
- Provision of bulky goods retail showrooms on the southern end of Angel Drove close to the new Southern Link Road; and
- The relocation of the existing sports facilities at Paradise to a site at Downham Road/A10 junction in order to develop the site as a District level outdoors sports and leisure centres, including an eight-lane swimming pool, health suite and six court sports hall.

5.34 Overall, Ely's relative market share within the entire study area has increased slightly between 2006 and 2011. New planned investment may serve as an additional future attraction to residents in Forest Heath District.

HAVERHILL

5.35 Like Bury St. Edmunds, Haverhill is designated as a Major Town Centre in the East of England Plan and is the other main town identified in St. Edmundsbury Borough Council's Core Strategy (2010). The town centre has benefited from significant private and public investment over recent years including:

- A new Cineworld leisure complex adjacent to the town centre, which includes complementary restaurants including Frankie & Bennies, TGIF, Subway and KFC;
- A 6,046 sqm (net) Tesco foodstore and cafe which opened in 2009; and
- A nearby Aldi of 1,022 sqm (net).

5.36 There has also recently been planning permission granted for a mixed use development south of the town centre including three bulky goods retail units.

- 5.37 Although the revitalisation of the town centre is lagging some way behind Bury St Edmunds in the North, the results of the 2011 HTIS show that Haverhill has still increased its market share for comparison goods in the study area, growing from 3.9% in 2006 to 5.6% in 2011. However, Haverhill attracts almost no comparison goods market share from either Forest Heath's CCA (0.1%) or SCA (0.0%).
- 5.38 In March 2010 the Council started a ten year regeneration programme for the town, investing significant capital in development facilities and enhancing the appearance of the town. Part of this includes the vision to redevelop a site directly adjacent to the town centre, Gurteen Factory/Chauntry Mills, into a mixed-use retail-led development. Gurteens engaged Bidwells with the intention of promoting the sale of the site on the open market. Together Bidwells and the Council produced a draft Development Brief which identifies the physical and policy constraints for the site. The draft Development Brief promotes a mixed use scheme on the site combining residential, retail, office and leisure uses. We understand that there are no current interests in purchasing the site, nor any immediate plans to bring forward the site for redevelopment.

OTHER CENTRES

- 5.39 Of the other main centres that exert an influence on shopping patterns within the defined study area, **King's Lynn** is the largest. It is designated as a *Major Town Centre* in the East of England RSS and is identified at the top of the settlement hierarchy as a sub-regional centre by King's Lynn and West Norfolk Core Strategy (July 2011). The town is located on the north west coast of Norfolk on the River Great Ouse, 64 km north of Newmarket and 42 km north of Brandon. The retail core in the town centre is relatively compact, focused on a pedestrianised circuit comprising the High Street, Broad Street, Norfolk Street, the Vancouver Centre and New Conduit Street.
- 5.40 The Vancouver Centre is the main managed shopping centre in the town and was originally built in the late 1960's. In 2004 the shopping centre was extended, including a new 700 space multi-storey car park and improvements to the bus station. The centre has also attracted new major national retailers to the centre, including TK Maxx, New Look and TJ Hughes. We understand the centre now comprises 35,946 sqm of floorspace.
- 5.41 According to the 2006 RTCS, King's Lynn drew circa 2.2% of total comparison goods expenditure from within the entire study area, drawing a stronger market share from the north of the study area.
- 5.42 The 2011 HTIS suggests that the market share for King's Lynn marketshare for combined comparison goods has decreased to 1.7% over the Study Area. Within Forest Heath's CCA, King's Lynn attracts only 0.4% of comparison goods expenditure.

- 5.43 Future plans for King's Lynn include the development of an eastern extension to the town centre. The *Town Centre Extension Development Framework* was endorsed by the Council in November 2008 and identifies the potential for a mix of uses, including leisure, residential and commercial uses, as well as up to 22,000 sqm of retail floorspace (including an anchor of approximately 4,645 sqm and a foodstore of up to 1,394 sqm). We understand the Council is now seeking development partners to help deliver the scheme. If and when this progresses we anticipate it will increase the attractiveness of the centre as a retail and leisure destination, particularly for residents in the north of the District.
- 5.44 **Thetford** is located at the intersection of Zones 3, 5 and 6 and therefore justifiably attracts a proportion of expenditure from within the study area (8.7% for comparison goods overall). Within Forest Heath CCA, it attracts 10.4% of comparison goods expenditure, with the strongest attraction in Zone 3 (36.3%). Within the CCA it also accounts for a minimal amount of expenditure from Zone 1 (1.7%) but none from Zone 2.
- 5.45 It also accounts for a reasonably high (13%) share of convenience goods expenditure from within the CCA. This is mostly drawn to the Sainsbury's on London Road (7%) and Tesco on Norwich Road (6%). Based on the results of the 2011 HTIS, 7% OF respondents who normally use the Sainsbury's for their main food shopping normally combine this with work/business, however there are no linked trips with work for the Tesco on Norwich Road.
- 5.46 Thetford is identified as a "Key Centre for Development and Change" by Policy TH1 of the East of England Plan. Breckland Council's Adopted Core Strategy (December 2009) identifies it as the strategic location for growth in the District over the plan period. The Core Strategy seeks to deliver an expansion retailing floorspace in the town centre by 7,000 – 7,500 sqm (comparison) and 2,000 – 2,500 sqm (convenience). This could potentially double the total amount of existing comparison goods floorspace (estimated at 7,510 sqm (net) in 2007 according to the NLP Retail Study Update) and increase the amount of total convenience floorspace by almost a quarter (from 9,071 sqm (net) estimated in 2007). The Thetford Area Action Plan Proposed Submission DPD (2011) seeks to direct this floorspace to five key sites in the town centre and through the intensification of the Thetford Retail Park. The Proposed AAP indicates a masterplan will be produced to help achieve these overarching objectives.
- 5.47 Finally, **Sudbury** is one of the two principle towns in Babergh District Council (the other being Hadleigh) and is located 53 km south east of Newmarket. The town serves as the main retail destination for its immediate catchment area and continues to have a severely limited influence on shopping patterns within the defined study area (0.3% in 2011 compared to 0.4% in 2006).

SUMMARY

- 5.48 The District appears to retain a reasonably high (71%) level of convenience goods expenditure within the CCA. Convenience goods expenditure leakages are mainly going to Thetford (13%) and Bury St Edmunds (8.3%). The District also attracts an element of convenience goods expenditure from outside of the District, accounting for 25.3% of convenience expenditure within the SCA and 2.7% in the OCA. Despite the presence and attraction of large out of centre foodstores, the District's centres continue to 'hold their own' in terms of retention of combined convenience goods expenditure.
- 5.49 The nearby higher order centre of Cambridge continues to attract a healthy level of comparison goods expenditure from the study area. This is considered reasonable bearing in mind its close proximity to the District and its role as a regional centre.
- 5.50 It is apparent that Bury St. Edmunds has increased its attraction to shoppers within the District. This will be linked to the opening of The Arc Shopping Centre in 2009.
- 5.51 The amount of market share to "other" competing centres has decreased drastically, since 2006, indicating that the District's centres are now competing for market shares within a more geographically constrained catchment area.

6.0 HEALTH CHECK ASSESSMENT: NEWMARKET TOWN CENTRE

- 6.1 This section sets out the key findings of the health check assessment for Newmarket town centre. This has been carried out in compliance with the key performance indicators (KPIs) set out in the PPS4 *Good Practice Guidance*, where the evidence is readily available.
- 6.2 Our analysis of the changes in the overall vitality and viability of Newmarket has principally been informed by the Experian *Goad Centre Reports*^{****} for Newmarket published in February 2006 (as detailed in the 2006 FHDC RTCS) and March 2011 (see **Appendix 4**). This evidence has been supplemented by other primary research and information, including
- the town centre audits conducted by FHDC between 1999 and 2011;
 - SP's audit of Newmarket in July 2011; and
 - the results of the household and street surveys commissioned as part of this study.
- 6.3 Finally, our assessment also draws on the key findings of Newmarket Town Council's 'Vision for Newmarket Town Centre' (April 2011). This was informed by some 514 responses to the 'Vision' questionnaire survey undertaken in July 2010, along with direct consultation with certain key individuals and organisations.

BACKGROUND

- 6.4 Newmarket is an important market town dating back to the thirteenth century. The town is located within the Cambridge sub-region, some 13 km from Mildehnall, 29 km from Brandon and 24 km from Lakenheath. It is recognised world-wide for its horse racing courses and industry, and its heritage is also closely associated with King Charles II.
- 6.5 The town is the largest centre in the District. It has a wide range of shops and services that predominantly serve its local residents and a largely rural catchment area. The centre's retail, leisure and wider town centre uses are mainly concentrated along the linear High Street and in the Guineas Shopping Centre (formerly known as the Rookery Shopping Centre). The High Street stretches approximately 500m in a south west to north east direction and is defined as the prime shopping area (PSA) by

^{****} It should be noted that Centre Report for Newmarket is based on the Goad Plan defined by Experian. In most cases the centre boundaries defined by Experian Goad do not necessarily match the centre boundaries or shopping areas defined by local planning authorities in their Proposals Map. The Goad Reports do not therefore necessarily reflect the total amount of retail and town centre floorspace in a particular centre. However, we note that in this case the extent of Newmarket's retail and wider town centre offer is relatively clear and, as a result, differences between the defined town centre boundary and GOAD plan appear to be minimal.

the Adopted Local Plan. It is also a busy A road (the A1304) which effectively bisects Newmarket's retail area. The southern end of the High Street provides the main concentration of bars and nightclubs in the town centre.

- 6.6 The **Guineas Shopping Centre** is a part covered 1970's constructed building and is the only managed shopping centre in the town. It has a reasonable mix of national multiples and other small independent stores and is anchored by a Marks & Spencer. We estimate that there are 56 outlets in the centre, trading from a total retail floorspace of some 9,290 sqm gross. Apart from Marks & Spencer other multiples include Argos, JD Sport, Card Factory, Carphone Warehouse, Dorothy Perkins, Peacocks, Superdrug, Claire's Accessories, Clarks, Clinton Cards, Holland and Barrett and Costa Coffee. These trade alongside smaller independent and specialist businesses. Notwithstanding its relatively wide range and choice of shops, the centre appears 'tired' and dated by modern standards. Its offer is largely 'hidden' behind the High Street and the average size of most outlets is small by modern standards.
- 6.7 Notwithstanding this there are signs that this centre could be set for new investment:
- First, Helical Bar has recently acquired the shopping centre; and
 - Second, the site has extant planning permission for a two storey extension to the M&S store, including partial redevelopment of the adjacent pay and display car park on Market Square to accommodate six kiosk style shops which was granted an extension of time for implementation in August 2011 (planning reference F/2011/0055/EOT).
- 6.8 The Guineas Shopping Centre is connected to the High Street by **Wellington Street**, which functions as a more secondary retail area and comprises mainly smaller independent shops. There are plans for the pedestrianisation of Wellington Street, although we understand that these are currently on hold.
- 6.9 To the south of Wellington Street, **Sun Lane** provides an attractive shopping environment and is characterised by a concentration of smaller independent retailers and service businesses, including Unique Bar, The Dressing Room and a delicatessen. Elsewhere in the town centre there is a concentration of small, independent shops and cafes/ restaurants on **Rous Road** and **Crown Walk**, which run perpendicular to the High Street and bisect it at the north end of the town centre.
- 6.10 As highlighted in Section 1.0, Newmarket's racecourse and training grounds attract significant visitors, tourists and spectators throughout the year. From this has grown a myriad of related businesses and industries.
- 6.11 Newmarket is the headquarters for various horse racing organisations, including the British Horse Racing Education and Standards Trust (BHEST), the Jockey Club (the sport's controlling body), and similar bodies for trainers and breeders. The industry has also fostered the growth of numerous down- and up-stream businesses such as specialist bloodstock services, horse sales (e.g. Tattersall's), trainers, saddlers, horse

transportation, veterinary health and rehabilitation, research, commercial and financial services and specialist suppliers. The town centre is also home to the National Horse Racing Museum and is the planned location of a Home of Horse Racing centre and the associated Sporting Art Gallery.

- 6.12 Together, it has been estimated that the horse racing industry directly employs approximately 25% of the total workforce in Newmarket, and the spin-off businesses employ even more. Overall, it is estimated that a third of all households in the town depend on the industry for income. Notwithstanding this, there does appear to be potential to increase the spin-off benefits for the town centre in terms of linked trips, longer dwell times and accommodation. The Town Council's 'Vision' document also identified the potential to promote the existing horse walks around the town centre as walking tours, in conjunction with visits to trainers' yards.
- 6.13 The town centre has become a popular night-time destination. However, at present the night-time economy is dominated by night clubs, with Newmarket widely considered as the clubbing "capital" of East Anglia. Although this industry provides an important contribution to the town's economy, it has its downsides, including anti-social activity and disturbances to other residents. Although only 1.7% of residents to the 2011 HTIS identified better control of anti-social behaviour as one of the improvements which would make them visit Newmarket town centre more often, according to the Town Council's *Vision for Newmarket* some 56% of respondents to the July 2010 survey thought that Newmarket's reputation as a night life centre deterred those wishing to visit the centre in the evenings. Outside of the younger population, the industry is seen to offer relatively little to other residents. We consider Newmarket's evening and night-time offer and economy in more detail in Section 9.0.

RETAIL PROFILE

- 6.14 The latest Experian Goad Centre Report for Newmarket indicates that the centre has some 214 outlets trading from a total (Goad^{****}) floorspace of 38,341 sqm. There has been no significant change in the scale of Newmarket's offer over the last five years, which highlights a lack of major new retail investment and development in the centre.
- 6.15 Table 6.1 below provides a more detailed breakdown of the changes in Newmarket's retail and service composition between 2006 and 2011.

^{****} The floorspace figures are derived from the Goad Plan and only show the footprint floorspace and the site area without the building lines. They do not include retail floorspace above ground floor level (except for managed shopping centres in most cases) and should not therefore be read as a definitive report of floorspace. Notwithstanding this, the floorspace figures do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

Table 6.1 Newmarket Retail Outlets Profile

	2006			2011		
	Outlets	%	UK Base	Outlets	%	UK Base
Convenience	17	7.87	9.12	12	5.61	9.02
Comparison	113	52.31	47.04	99	46.26	41.71
Services	77	35.65	32.25	80	37.38	34.89
Vacant	7	3.24	10.24	21	9.81	13.20
Miscellaneous	2	0.93	1.35	2	0.93	1.18
TOTAL:	216	100	100	214	100	100

Source: Experian Goad Centre Reports (February 2006 and March 2011). The 2006 data is derived from the *FHDC Retail & Town Centre Study* (June 2006).

Notes: Figures may not sum to 100% due to rounding. 'Miscellaneous' includes post offices, employment offices, etc.

- 6.16 Table 6.2 sets out the (Goad) floorspace estimates for Newmarket in 2011 only, as the 2006 *FHDC RTCS* did not provide a detailed breakdown of floorspace by retail and service categories.

Table 6.2 Newmarket Retail Floorspace Profile 2011 (sqm)

	square metres	%	UK Base (%)
Convenience	5,295	13.81	17.23
Comparison	20,021	52.22	47.15
Services	9,290	24.23	23.08
Vacant	2,620	6.83	11.52
Miscellaneous	1,115	2.91	1.02
TOTAL:	38,341	100	100

Source: Experian Goad Centre Reports (February 2006 and March 2011). The 2006 data is derived from the *FHDC Retail & Town Centre Study* (June 2006).

- 6.17 We describe the key characteristics of the centres retail and service composition in more detail below.

DIVERSITY OF USES

Convenience Goods

- 6.18 Table 6.1 shows that the number of convenience goods outlets in the town centre has fallen from 17 to 12 outlets since 2006. Current provision represents 5.6% of total outlets in the town centre, which is significantly below the national average of 9.0%.

- 6.19 The total estimated convenience goods floorspace of 5,295 sqm is equivalent 13.8% of Newmarket's total floorspace, which is also below the national average of 17.2%.
- 6.20 A more detailed breakdown of the convenience goods category based on the latest Experian Goad Report shows that there are no greengrocers, fishmongers and smaller CTN/ convenience stores in the centre. On a more positive note, Newmarket has a relatively good representation of bakers (3 outlets), butchers (2) and off licences (2).
- 6.21 There are a further five outlets categorised by Experian Goad as being grocery and frozen food retailers, including Waitrose. This represents 2.3% of total outlets, which is slightly below the national average of 2.9%.
- 6.22 The main food provision in the town centre includes the Marks & Spencer foodhall (372 sqm net) in the Guineas Shopping Centre and Iceland (488 sqm net) on Crown Walk.
- 6.23 Waitrose is located in the northern part of the centre adjacent to Fordham Road on Fred Archer Way. It is defined as being **edge of centre** in policy terms and comprises a total net sales area of 4,150 sqm (gross). The store relocated in 2004 from an older building on the High Street, which is now occupied by TK Maxx. Its in-store offer includes a bakery, fishmongers, deli and meat counter, fresh salad bar and cafe. We estimate that approximately 80% of the store's sales area is currently devoted to convenience goods, with the remainder used for the sale of a limited non-food offer including CDs, DVDs, cards and stationary. The store is served by some 430 free car parking spaces, which are also available free of charge to town centre users for up to two hours.
- 6.24 Market Square also hosts a twice weekly market on Tuesdays and Saturday which has a number of stalls selling fresh fruit and vegetables and other fresh produce.

Comparison Goods

- 6.25 Newmarket's comparison goods offer has also fallen from 113 units in 2006 to 99 in 2011. Notwithstanding this, its current provision of 46.3% is still above the national average of 41.7%. Table 6.2 shows that Newmarket has a relatively good provision of comparison goods floorspace (20,021 sqm).
- 6.26 In terms of total outlets and floorspace it appears that Newmarket has maintained a relatively good provision, despite the impact of the economic recession on the retail sector.
- 6.27 A more detailed breakdown of comparison goods retailing based on the latest Experian Goad Report shows that all the main categories are represented in the town centre.
- 6.28 The only significant under-representation of outlets and floorspace is in the '*DIY, hardware and household goods category*' (1.4% of total outlets and 1.8% of total floorspace benchmarked against the national average of 2.5% for outlets and 4.6% for floorspace). However, this is not unusual as retailers selling typically 'bulky' goods

generally prefer to trade from larger retail warehouse formats in edge or out-of-centre locations. Other non-food retail categories where provision as a proportion of total floorspace is also below the national average include:

- mens and boys wear;
- china, gifts, glass and leather goods; and
- footwear and repairs.

6.29 Those retail categories that appear to be well represented in the town centre in terms of outlets and floorspace when benchmarked against the national average include:

- Books, arts/ crafts and stationers/ copiers (12 outlets/ 5.6% of total outlets);
- Cars, motorcycles and accessories (6 / 2.8%)
- Chemists, toiletries and opticians (9 / 4.2%)
- Florists and gardens (3 / 1.4%); and
- Sports, toys, cycles and hobbies (6 / 2.8%).

6.30 The Goad Report indicates that there are 3 retailers classified in the '*variety and department stores, and catalogue showrooms*' category. This is equivalent to 1.4% of total outlets, which is above the national average of 0.6%. However, when considered in terms of the total floorspace of 2,081 sqm, total provision in this 'large format' store category of 5.4% is below the national average of 6.5%.

Service Business Offer

6.31 Service businesses as defined by Experian Goad can be sub-divided into the following three sub-categories.

- **Retail services** - including hairdressers, beauty salons, travel agents, launderettes, opticians, etc.;
- **Leisure services** - which comprise cafes and restaurants (Class A3) and fast food/ takeaway outlets (Class A5); and
- **Financial and professional services** - covering all Class A2 uses (such as banks, estate agents, etc). However, please note that betting shops are not defined by Experian Goad for the purpose of the Centre Summary Reports.

6.32 Table 6.1 shows that total service businesses in the town centre have increased slightly from 77 to 80 between 2006 and 2011, trading from some 9,290 sqm. Currently, service outlets represent 37.4% of all units and 24.2% of total floorspace in Newmarket, which is above the national average of 34.9% and 23.1% respectively.

6.33 A more detail breakdown of provision indicates that the town's service provision is largely dominated by places to eat and drink, along with health and beauty services. Excluding public houses, Experian Goad estimate that there are some 31 cafes and

restaurants (Class A3) and fast food/ takeaway outlets (Class A5) outlets in Newmarket. Notwithstanding this, current provision (14.5%) is estimated to be slightly below the national average (15.8%).

- 6.34 The Council's own audit of the town centre has identified a higher number of Class A3-A5 outlets in 2011 of 40.5 (please note that half units reflect dual premises). We note that the total number of recorded Class A3-A5 outlets across the town as a whole has increased by over one-quarter since 2000, from 32 outlets.
- 6.35 There are also some 23 hairdressing, beauty and health services, which is equivalent to 10.75% of total outlets and is above the national average of 8.3%.
- 6.36 Benchmarked against national average figures the centre also appears to have a relatively good choice of travel agents, banks, building societies, estate agents.
- 6.37 The Town Council's recent '*Vision for Newmarket Town Centre*' identified that many respondents to the questionnaire considered that "*saturation point*" had been reached for fast-food outlets, betting shops and mobile phone stores in the town centre. Our updated assessment shows that there are 10 betting shops located across the town centre, including four Ladbrokes outlets, BetFred and Coral Bookmakers.

The Market

- 6.38 We understand that the number and variety of stalls on Newmarket's twice weekly market have declined over recent years. In response to the Town Council's '*Vision*' questionnaire approximately half of all respondents indicated that they "rarely" used the market; one-third used it on a weekly basis; and only one in six used it twice a week.
- 6.39 The market stalls are mainly used for purchases of fresh fruit and vegetables (56% of respondents to the '*Vision*' questionnaire indicated that this was their main purchase) and other fresh produce (circa one-third).
- 6.40 Significantly, some 80% of respondents to the Town Council's '*Vision*' questionnaire wanted to see the market improved. The main improvements identified included the need for more stalls, a wider variety of stalls and better quality products sold. There was also support for different themed markets including a Farmers' Market, Continental Market and Craft Market. Respondents indicated that they would use the market more regularly if it was improved.
- 6.41 Some 10% of respondents also indicated that moving the market to an alternative site in the town centre could improve its overall vitality and viability. Suggested alternative locations included the wide pavement between the Clock Town plaza and Rutland Hill.
- 6.42 We understand that Newmarket Town Council has announced its intention to move the market to the High Street. We consider that, subject to finding suitable space to re-

accommodate the market on the High Street, this could potentially enhance the footfall of existing stalls and open up the Market Square for redevelopment for alternative (retail) uses.

DIVERSITY OF OTHER MAIN TOWN CENTRE USES

- 6.43 As previously described, Newmarket is the dominant retail, leisure and commercial destination within the District. It has a rich heritage connected with its world-wide status as the international centre for horseracing, and is one of the more popular night-time destinations within the East of England.
- 6.44 Beyond the horseracing industry, leisure uses in Newmarket are mainly comprised of nightclub/bars, public houses, cafes and restaurants.
- 6.45 There is a new leisure centre on Exning Road, approximately 1 km from the town centre. This site also includes an all-weather pitch, which is home to the Newmarket Hockey Club, and the playing fields at Newmarket College. Further fitness facilities are available at Studlands Retail Park and various hotel health clubs and spas. The Memorial Hall in the town centre also provides a venue for a range of sports and activities.
- 6.46 The former venue for a snooker club and ten pin bowling in the town is being redeveloped for housing, but an alternative venue has not been identified. The Town Council's 'Vision for Newmarket Town Centre' indicates that there is nowhere for younger people under the age of 18 to go, other than the small Youth Club in Foley House which is only open one evening each week and is not open at weekends.
- 6.47 Newmarket used to have three cinemas, but currently films are only shown monthly in the Stable by a group of volunteers. The Newmarket Town Council has expressed a wish to see a cinema in the town centre and the Vision document states that:

"If the town centre is once again to become a vibrant and welcoming place in the evenings, then it is important that a variety of recreational and entertainment establishments become the focus of activity. If this were to happen the dominance of the pubs and clubs might diminish. In order to achieve this, there should be positive encouragement for the building of a multi-entertainment complex near the town centre".

- 6.48 As stated previously, the town centre has also become a popular night-time destination, although its offer is predominantly targeted at the 18-30 market. Outside of the younger population, the industry is seen to offer "relatively little to other residents". The Town Council's vision for Newmarket's night time economy is one of "...a variety of entertainment to suit most tastes that is in harmony with the town and its residents" (page 43). Some of the facilities identified by the Town Council include:
- a cabaret entertainment club similar to that in Newmarket some years ago;

- club style entertainment for younger people;
- affordable family restaurants;
- quality restaurants and cafes;
- a bowling alley;
- snooker room; and
- roller skating facilities.

6.49 Although the Town Council conclude that it is "*debateable*" whether this is all achievable, particularly in the short term, it also identifies that the major "*barriers*" to achieving this include the levels of crime, antisocial behaviour, late night drinking and drug taking in and around the town at night.

6.50 In terms of new hotels, a 75-bed new economy hotel has been built on Fred Archer Way.

6.51 Apart from its retail and service offer, and the positive impact of the horse racing industry on the town's local economy, Newmarket also has a range of other activities which encourage visitors and generate footfall. These include places of worship; hotels and guest houses; doctors surgeries and health facilities; museums; parks; and golf clubs.

USE CLASS PROFILE

6.52 Based on the Council's audits of Newmarket, we have also been able to assess the broad changes in the centre's Use Class Profile by number of outlets and total representation between 2009 and 2011. This has been further broken down into primary and secondary retail frontages and the extent of the Primary Shopping Area proposed as part of the emerging Development Management DPD. Please note that the primary and secondary retail frontages have been internally defined by the Council as part of their town centre monitoring and are not a proposed allocation.

Table 6.3 Newmarket's Use Class Profile – Number & % of Outlets (2009)

2009	NUMBER						%				
Use Class	Primary Frontage	Secondary Frontage	PSA	Other	Vacant	Total	Primary Frontage	Secondary Frontage	Proposed PSA	Other	Vacant
A1	88	45	133	23	10	156	65.7	48.4	58.6	30.7	71.4
A2	14	16	30	4	1	34	10.4	17.2	13.2	5.3	7.1
A3/A4/A5	20	9	29	11	1	40	14.9	9.7	12.8	14.7	7.1
B1&2	6	6	12	16	1	28	4.5	6.5	5.3	21.3	7.1
C1&3	1	4	6	2	0	7	0.7	4.3	2.6	2.7	0.0
D1&2	5	3	8	9	1	17	3.7	3.2	3.5	12.0	7.1
Sui	-	10	10	10	-	20	0.0	10.8	4.4	13.3	0.0
TOTAL:	134	93	227	75	14	302	100	100	100	100	100

Source: Informed by Forest Heath District Council – Town Centre Audit 2009.

Notes: The centre boundary set out in the Forest Heath District Council 1995 Local Plan was used for the purpose of the surveys. Primary and secondary frontages are based on internal areas identified and used by the Council as part of their monitoring. The Primary Shopping Area (PSA) is as proposed in the emerging Development Management DPD. Please note that half units reflect dual use premises.

Table 6.4 Newmarket's Use Class Profile – Number & % of Outlets (2011)

2011	NUMBER						%				
Use Class	Primary Frontage	Secondary Frontage	PSA	Other	Vacant	Total	Primary	Secondary	Proposed PSA	Other	Vacant
A1	85.5	47	132.5	27	12	159.5	67.9	52.2	61.3	31.0	54.5
A2	16	17	33	6	2	39	12.7	18.9	15.3	6.9	9.1
A3	12	5	17	5	3	25.5	9.5	5.6	7.9	5.7	13.6
A4	4	2	6	2	0	8	3.2	2.2	2.8	2.3	0.0
A5	3	2	5	2	0	7	2.4	2.2	2.3	2.3	0.0
B1&2	2	3	5	16	3	19.5	1.6	3.3	2.3	18.4	13.6
C1&3	1	3	4	2	0	6	0.8	3.3	1.9	2.3	0.0
D1&2	1.5	3	4.5	16	1	20.5	1.2	3.3	2.1	18.4	4.5
Sui	0	8	8	8	1	16	0.0	8.9	3.7	9.2	4.5
TOTAL:	126	90	216	87	22	302	100	100	100	100	100

Source: Informed by Forest Heath District Council – Town Centre Audit 2011.

- 6.53 As the tables show, the number of Class A1 (retail) outlets has increased slightly between 2009 and 2011, from 156 to 159.5 outlets. Closer analysis shows that the proportion of Class A1 (retail) uses in Newmarket's internally defined primary retail frontage has increased from 65.7% to 67.9%. There has also been an increase in Class A1 uses within the secondary retail frontage (from 48.4% to 52.2%) and for the 'other' shopping streets. In the proposed Primary Shopping Area (PSA), the representation of Class A1 retail units in the proposed PSA grew from 58.6% to 61.3% of total units between 2009 and 2011.
- 6.54 In terms of places to eat and drink, there are currently 40.5 outlets in the town centre according to the Council's audit, which represents only a slight change from the 40 recorded in 2009. Of these, there are some 28 (Class A3-A5) outlets in the proposed PSA, which represents 13% of total outlets.

MULTIPLE & INDEPENDENT RETAILER REPRESENTATION

- 6.55 A multiple retailer is normally defined as being part of a network of nine or more outlets. It is recognised that a good presence and mix of multiples in a town centre can help to greatly improve its overall attraction and performance. Multiples are a strong draw for customers and they help to generate frequent shopping trips to centres, strong footfall and sales across the centre.
- 6.56 Experian Goad identified that there were 84 multiple retailers in Newmarket in 2006. This was equivalent to 39% of total units, which was above the national average of 34%. The most recent Experian Goad Report shows that the number of multiple retailers has fallen slightly to 76 in 2011. Notwithstanding this fall, total provision as a proportion of total outlets (35.5%) is still significantly above the national average (29.9%).
- 6.57 The Experian Goad Report also identifies some 27 national multiples that are considered to be key town centre 'attractors' (i.e. those retailers defined by Experian as most likely to improve the attraction of a centre to customers). Of these, 15 are represented in Newmarket including Argos, Boots, Clarks, Dorothy Perkins, Marks & Spencer, New Look, Superdrug, TK Maxx, Vodafone, Waitrose and WH Smith.
- 6.58 Other high profile multiple retailers that are represented in the town centre, but are not covered by Experian Goad's shortlist include Peacocks, Lloyds Pharmacy and Costa Coffee. Elsewhere in the town centre the other high profile multiple retailers include Currys Digital, Shoe Zone, Thorntons, Iceland and various mobile phone retailers.
- 6.59 Those key multiples on Experian Goad's shortlist that are not represented include BhS, Burton Group, Debenhams, H&M, HMV, House of Fraser, John Lewis, Next, Primark, River Island, Sainsbury's, Tesco, Topman, Topshop, Waterstones and Wilkinsons. Other retailers that we would also possibly expect to be represented in the town centre

include Zara and Hennes. Newmarket also lacks a large, major department store to 'anchor' its retail offer.

- 6.60 Based on our audit of the town centre it is apparent that Newmarket also has a relatively good choice of independent and specialist retailers selling a wide range of goods. There is a noticeable cluster of independent retailers at the Exeter Road end of the High Street, as well as along Sun Lane and Kingston Passage. Some of the specialist independents and local retailers include Martha V ladieswear, Anne Furbank ladieswear, Celiks, Moons Toymaster and Goldings menswear.

RETAILER DEMAND

- 6.61 Table 6.5 below shows changes in the number of operators with requirements for representation in Newmarket between 2004 and 2010 based on the CoStar 'Town Focus' reports.

Table 6.5 Retailer Demand in Newmarket, 2004-2010

	April 1999	April 2002	April 2004	April 2005	April 2006	Oct 2007	April 2009	Jan 2010
Number	10	25	23	27	30	37	16	14
Rank	379	243	283	272	276	265	235	283

Source: CoStar Town Focus Report (September 2011)

- 6.62 As the table shows, published requirements increased steadily between 1999 and 2007, peaking at 37. Requirements have fallen back dramatically since 2007 to just 14 operators. This is mainly explained by the impact of the economic recession on retailer and business confidence, which has reduced requirements for all the UK's town centres to varying degrees. Notwithstanding this, Newmarket has maintained its position of 283rd in the national ranking since 2004 and has never been ranked higher than 235th.
- 6.63 CoStar's more detailed 'Retail Focus' Report publishes the names and floorspace requirements of specific retailers, and can help to determine the type, quality and scale of market demand for specific centres. In 2006, the total demand from retailers and service businesses was equivalent to between 10,139 sqm and 15,201 sqm of gross retail floorspace. The majority of this was accounted for by comparison goods retailers, with some 17 operators seeking between 7,868 sqm and 12,452 sqm gross retail floorspace. Some of the more high profile operators with requirements at that time included Desire by Debenhams, Laura Ashley, Bon Marche, B&Q, O2, Tchibo, Aldi, Farmfoods, Costa Coffee, Pizza Hut and Saks Hairdressers.
- 6.64 However, it is important to note that the requirements identified by the 2006 study for comparison goods retailing were 'skewed' heavily by the reported requirement by B&Q for a store of between 3,716 and 5,109 sqm gross. A planning application was granted

for a 4,780 sqm (net) store, adjacent to Oaks Business Park in 2007, however this is not now proceeding and we understand B&Q's requirement has fallen away^{§§§§}. Of the remaining retailers identified in 2006, only Costa Coffee has since taken space in Newmarket.

- 6.65 The most recent 'Retail Focus' Report (September 2011) for Newmarket indicates that the main retailers with stated requirements are Bargain Books, Past Times, Everything Everywhere Limited, McDonalds and Frankie & Benny's. Together these operators are seeking between 1,000 sqm and 1,330 sqm gross in the town centre, which is less than 10% of the floorspace requirements identified in 2006.

PRIME ZONE A RENTAL LEVELS

- 6.66 Rental levels are an important indicator of a centre's overall retail health and attraction. For the purpose of our assessment we have focussed on the prime Zone A^{*****} rents achieved in Newmarket over the last decade, benchmarked against the levels achieved in the nearby centres of Bury St Edmunds and the higher order centres of Cambridge, Haverhill, King's Lynn, and Ely.

Table 6.6 Changes Prime Zone A Rents (£/sqm), 2000-2010

	2000	2002	2004	2006	2008	2009	2010	Change: 2000- 10
Cambridge	£2,422	£2,583	£2,583	£2,583	£2,637	£2,691	£2,637	+8.9%
Bury St Edmunds	£969	£1,130	£1,130	£1,130	£1,238	£969	£969	0.0%
King's Lynn	£861	£915	£915	£915	£915	£700	N/A	-18.7%
Newmarket	£538	£646	£700	£700	£753	£700	£646	20.0%
Haverhill	£377	£431	£484	£484	£538	£431	£431	+14.3%
Ely	£484	£484	£592	£646	£646	£538	£538	+11.2%

Source: CoStar Town Focus Reports / Colliers CRE.

- 6.67 As the table shows, Newmarket's current rents are above Ely and Haverhill, at the same level as King's Lynn, but lower than the higher order centres of Cambridge and Bury St Edmunds.

- 6.68 Significantly, although there have been fluctuations in Newmarket's prime retail rents since 2000, the general trend has been upwards. Between 2000 and 2008, for

^{§§§§} The site is now subject to a pending application by Tesco for a 10,000 sqm (net) store to replace their existing store west of Fordham Road.

^{*****} Prime Zone A rental levels represent the rental value for the first 6 metres depth of floorspace in retail units from the shop window.

example, Newmarket experienced a 40% increase in rental levels from £538 per sqm to £753 per sqm. This represented a stronger growth than in the other centres, including Bury St Edmunds (+28%) and Cambridge (+9%).

- 6.69 Rents have fallen across all the centres since 2008, coinciding with the impact of the recession. However, given the severity of the economic downturn, Newmarket's prime rents appear to have held up relatively well benchmarked against other competing centres.

COMMERCIAL YIELDS

- 6.70 The commercial yield on non-domestic property can provide a further indication of investor confidence in the long term performance of a town or shopping centres. Yield is a measure of property value and is the ratio of rental income to capital value; expressed in terms of the open market rent of a property as a percentage of the capital value. In general terms the higher the (%) yield, the lower the rental income is valued and vice versa. A higher yield is normally interpreted as an indication of concern by investors that rental income might grow less rapidly and be less secure than a property with a low yield.
- 6.71 Table 6.7 below sets out prime shopping centre yields taken from the Property Market Report prepared by the Valuation Office, published in January 2008. This provides the most up to date data available, as more recent reports by the Valuation Office have not included shopping centre yields.

Table 6.7 Shopping Centre Yields (%), 2002-2010

	2002	2003	2004	2005	2006	2007	2008	2010
Newmarket	7.5	7.25	6.75	6.75	6.5	6.25	6.0	n/a
Cambridge	5.25	5.5	5.5	5.25	5.25	5.0	5.25	n/a
Bury St Edmunds	5.0	5.0	5.25	5.0	5.25	5.0	4.75	n/a
Ely	8.75	8.75	7.0	7.0	6.0	6.0	6.0	n/a
Haverhill	8.0	7.75	7.75	7.75	7.25	7.0	6.75	n/a

Source: Valuation Office Property Market Report (January 2008).

Notes: The dates when the commercial yields were recorded vary from year to year.

- 6.72 The table shows that Newmarket's prime yields have improved from 7.5% to 6.0% between 2002 and 2008. This was a positive sign of increased confidence in the investment value of the town centre. In 2008 Newmarket's yields were lower (stronger) than Haverhill and were at the same level as Ely, but higher (weaker) than Cambridge and Bury St Edmunds. This confirms that whilst the centre has improved its position between 2002 and 2008, it is not as strong as other larger, higher order centres in the sub-region.

- 6.73 The Valuation Office has not recorded shopping centre yields since January 2008 and it is not therefore possible to comment on the current position in Newmarket and the other centres. Notwithstanding this, it is reasonable to assume that all the yields across all the centres will have increased (weakened) since 2008 due to the long term impact of the recession on retailer and investor confidence.

VACANCY LEVELS

- 6.74 The proportion and scale of vacant street level property in a centre and the length of time properties have been vacant represents one of the more important indicators to help inform an assessment of a centre's overall vitality and viability. High vacancy levels in a centre, or a concentration of vacancies in certain areas/ streets, could point to underlying weaknesses in terms of retailer demand and/ or the fact that the vacant units are not 'fit-for-purpose'. However, vacancies can arise in even the strongest centres and this indicator must be used with care.
- 6.75 As Table 6.1 shows, vacant outlets in Newmarket have increased from 7 in 2006 to 21 based on the latest Experian Goad Report (March 2011). Notwithstanding this increase, the vacancy level in March 2011 of 9.8% was below the national average of 13.2%. Newmarket's total vacant floorspace is estimated to be 2,620 sqm. This is equivalent to 6.8% of the town's total floorspace and is also below the national average of 11.5%.
- 6.76 The more recent audit of the town centre in 2011 identified some 22 vacant units. Of these, 12 were vacant Class A1 outlets, two were Class A2 outlets, three were Class A3 and the remainder were either Class B1, D1 or sui generis.
- 6.77 Based on the Council's and SP's audits there were no significant concentrations of vacant units on specific streets to indicate that particular areas of the centre are failing or are necessarily unattractive as shopping locations. Notwithstanding this, we did note that 7 of the 22 vacant units were in the Guineas Shopping Centre. Although this centre is located within the town's prime retailing pitch, the majority of the vacant units are small and may not meet the requirements of modern retailers for larger floorplates. This is underlined by the fact that most of the larger vacant shop units in the town centre tend to be reoccupied relatively quickly including, for example, the QD unit taking up the former Woolworths.
- 6.78 To help address the increase in vacancy levels due to the impact of the economic downturn, we understand that the *Newmarket Town Centre Partnership* has organised a "*Dragon's Den*" competition to get new operators into vacant units at reduced rates. This may have had a positive impact by reducing vacancy levels over the short term.

OUT OF CENTRE RETAIL PROVISION & PROPOSALS

- 6.79 Studlands Retail Park is the only out of centre retail park in Newmarket. It is located over 2 km to the north of the town centre on Fordham Road (A142). The retail park provides circa 4,933 sqm (net) of predominantly 'bulky goods' floorspace. The key retail warehouse operators are Homebase, Halfords, Carpet Right and Pets at Home.
- 6.80 The retail park was granted planning permission in 1987 and the original condition was varied in 1993 to allow the sale of Class A1 food retailing in Unit 3. This resulted in Netto opening a store in the park with an estimated sales area of 810 sqm (net). Netto has recently been replaced by Asda, following its purchase of the deep discount retailer. Other operators include Burger King, adjacent to the entrance, and ARC Carwash.
- 6.81 Approximately 200m to the south of the retail park on Fordham Road is a 24 hour Tesco store. The store opened in 1988 and is the largest and only stand-alone foodstore trading outside of Newmarket town centre. It has an estimated net sales area of 2,388 sqm, of which approximately 95% is used for the sale of convenience goods and 5% to comparison goods⁺⁺⁺⁺.
- 6.82 Four planning applications have recently been submitted for new or replacement foodstores in the Newmarket area. These are described below.
- 6.83 An application has recently been submitted by Tesco to relocate their current store to an adjacent site (Reference: F/2011/0084/FUL). As the table below shows the application is for a significantly larger replacement store with a net sales area of 5,674 sqm, to include 3,103 sqm of convenience floorspace and 2,571 sqm of comparison goods floorspace. This would represent a 469 sqm (net) increase in the existing store's convenience goods offer and a more significant 2,644 sqm (net) increase in the comparison goods sales area.

Table 6.8 Tesco, Fordham Road – Existing and Proposed Sales Areas (sqm net)

	2003 Consent	Proposed	Increase
Convenience Floorspace:	2,281	2,750	+469
Comparison Floorspace:	106	2,750	+2,644
TOTAL:	2,388	5,500	+3,113

Source: RPS Retail Assessment Report (February 2011).

⁺⁺⁺⁺ Net sales are taken from original Decision Notice for Tesco (Reference F/2001/395). We understand the consent limits the net retail sales area to 2,388 sqm, with reference to a separate letter which includes a floorspace schedule setting out the mix of convenience and comparison at 2,281 sqm and 106 sqm respectively.

- 6.84 Sainsbury's Supermarkets Limited and the Trustees of EG Lampton 1974 Settlement also submitted a planning application in September 2011 for the development of a new food store; three non-food retail units; a 7-screen cinema; three (Class A3) restaurants (one of which is a drive thru restaurant); housing; car parking; and a petrol filling station at the George Lampton Playing Fields site, Fordham Road, Newmarket (Reference: F/2011/0541/HYB). The table below sets out the convenience and comparison goods sales area of the proposed Sainsbury's foodstore and the non-food retail floorspace.

Table 6.9 Sainsbury's & Non-Food Retail –Proposed Sales Areas (sqm net)

	Sainsbury's	Non-Food Retail	Total
Convenience Floorspace:	2,727 (72%)	-	2,727
Comparison Floorspace:	1,043 (28%)	3,414	4,457
TOTAL:	3,770 (100%)	3,414	7,184

Source: Indigo Retail & Leisure Assessment (July 2011).

- 6.85 The two restaurant units would have a combined gross internal area (GIA) of 682 sqm. The proposed drive-thru restaurant is 426 sqm.
- 6.86 An application was also submitted by Freeth Cartwright on behalf of Simons Developments Limited (SDL), Optimisation Developments Limited (Morrisons) and Birch Sites Limited for the redevelopment of the former gas works site on Exning Road to provide a new Morrisons foodstore with associated car parking, access (including a new roundabout off Exning Road), servicing and landscaping (Reference: F/2011/0712/FUL). The proposal is for a store with a net sales area of 2,275m² (24,487 sq ft). The applicants have assumed that some 20% (455m²) of the net sales area will be set aside for comparison goods because, unlike other large format foodstores, Morrisons stock a limited range of comparison goods. The application is for 1,820 sqm (net) of convenience goods floorspace.
- 6.87 A fourth application was submitted by the Unex Group in May 2012 for a retail, hotel, restaurant/bar and equestrian mixed use development, on land under their ownership at 196-198 and 218-222 High Street including the former swimming pool site (Reference: F/2012/0216/FUL). The retail element of the proposal is for an Asda foodstore of circa 3,716m² (40,000 sq ft) net. The Asda application is the only proposal which has come forward on an edge-of-centre site. The pre-application plans to date confirm that, in principle, the site is capable of accommodating a reasonably size foodstore that would have the necessary 'critical mass' to 'claw back' shopping trips and expenditure to a location that is closer to the town centre than the other foodstore application proposals.
- 6.88 Table 6.10 below summarises the total convenience and comparison floorspace proposed in the four live planning applications in the Newmarket area.

Table 6.10 Summary of Pending Planning Applications –Proposed Sales Areas (sqm net)

	Tesco (increase)	Sainsbury's & Non- Food Units	Morrisons	Asda	Total
Convenience Floorspace:	469	2,727	1,820	2,230	7,246
Comparison Floorspace:	2,644	1,043 + 3,414	455	1,487	9,043
TOTAL:	3,113	7,184	2,275	3,717	16,289

- 6.89 To provide some context, at present there is some 7,169 sqm (net) of out-of-centre retail floorspace in Newmarket. This compares with the town centre's current retail floorspace of 17,721 sqm. If all of the above applications were granted, this would increase the total out-of-centre floorspace to 23,458 sqm, far exceeding the amount of retail floorspace in Newmarket town centre.

ACCESSIBILITY

- 6.90 Newmarket has good connections to the main road network. The High Street (A1304) provides access at either end to the A11 and A14. At the south west end of the A1304, the A14 provides direct access to Cambridge (22.5 km) and the A11 links with the M11 (26 km) which goes to London and the south east. The north east end of the A1304 the A11 passes south of Mildenhall and provides direct access to Thetford (32 km), with the A14 linking directly with Bury St Edmunds, 19 km east.
- 6.91 Newmarket rail station is located in the southern part of the town, approximately 10 minutes walk from the High Street and main shopping area. The station has hourly services to Cambridge to the west and Ipswich to the south east. Train journeys to Cambridge are approximately 22 minutes long, with train journeys to Bury St Edmunds taking approximately 20 minutes. Significantly, the responses to the Town Council's 'Vision' questionnaire identified the need for improvements to the railway station, including better waiting facilities, better lighting and improved passenger information.
- 6.92 Newmarket has good bus services to a range of local and long distance locations, including London and Ipswich. The County Council has recently established a new subsidised bus service which allows traveller to purchase £1 TownRider tickets that offer unlimited travel within Newmarket for one day. Buses connect to several important local facilities including the town centre, Newmarket Hospital, Studlands Retail Park, Studlands Park Centre, the Tesco on Fordham Road, as well as a number of residential areas. In response to the Town Council's 'Vision' questionnaire we note

that one-third of respondents identified the need for better bus station facilities and Real Time Passenger Information.

- 6.93 The town has good park-and-ride facilities, with 215 long stay spaces located approximately 2km north of the town off the A142 on Willie Sniath Road. As shown in Table 6.11 below, the town also has a good number of short and long stay car parks, which are reasonably priced and in close proximity to town centre facilities.

Table 6.11 Car Parking Provision, Newmarket

Location	Estimated no. of spaces	Charging
Town centre Short Stay Car Parks		
Rous Road	197	Up to 2 hours: 50p
Market Square	58	Up to 3 hours: 90p
Guineas Multi-Storey Car Park	400	Maximum 3 hours Free between 16.00-08.00, Sundays and Bank Holidays
Long Stay Car Parks		
All Saints Road	162	Up to 2 hours: 50p
Grosvenor Yard	76	Up to 3 hours: 90p
Church Lane/St Marys/Turners Hall	40	Up to 4 hours: £1.60 Up to 8 hours £1.75 Free between 16.00-08.00, Sundays and Bank Holidays
Total	933	

Source: Forest Heath District Council Car Parking Locations in Newmarket.

- 6.94 Parking in the High Street is currently limited to two hours, with no return permitted for two hours. We note that approximately one-third of respondents to the Town Council's 'Vision' document favoured limiting the parking in the High Street even more strictly to allow more people to undertake quick visits and thereby increase the turnover of visits to the High Street. The suggestion is to reduce the time limit to 15-30 minutes, with no return within two hours.

CRIME AND SAFETY

- 6.95 There are issues with regard to the perceptions of safety in the town centre, particularly at night. The Council's 'Vision' document identified that some 42% of respondents to their questionnaire indicated that they felt "unsafe". However, the results of the on-street survey undertaken in Newmarket town centre as part of this study indicate that of those who visit the town centre in the evening, the majority of respondents (72.1%) said that safety and security was either 'very good' or 'quite good.' Of the remaining respondents who expressed an opinion, 17.4% said it was

'neither good nor poor,' with the remaining 10.5% saying it was 'quite poor' or 'very poor.'

- 6.96 We understand that the SOS bus, Town Pastor scheme and Safer Neighbourhood Team has made a positive contribution to a reduction in incidents and have provided support to the police by dealing with more minor incidents. Notwithstanding this, the 'Vision' identified that only 17% of respondents visit the town centre at night on a weekly basis and 24% stated that they never visit the town at night. Interestingly, some 72% of respondents stated that they would visit the town more often at night if a cinema or youth club was provided.
- 6.97 In January 2008 the FHDC Licensing Authority resolved to implement a **Cumulative Impact Policy** in respect of Newmarket town centre. Although the licensed premises have staggered their closing times, it still results in a large number of people spilling out on to the streets at the same time, with a resultant impact on the transport system and problems with crime, disorder and public nuisance. However, crime was not identified by any respondent as one of the main things that they disliked about the town although 1.7% of respondents identified better control of anti-social behaviour as one of the improvements which would make them visit Newmarket town centre more often.
- 6.98 The Council has resolved to adopt a policy which will seek to prevent a further increase in the number of licensed premises within the town centre. The Town Council's 'Vision for Newmarket Town Centre' supports the stance and states that the Cumulative Impact Policy should be "enforced vigorously" to prevent the proliferation of further licensed premises in and around the High Street.

ENVIRONMENTAL QUALITY

- 6.99 As stated earlier in this section, the linear High Street is also a busy A road (the A1304) and effectively bisects Newmarket's retail area. The high levels of traffic along the High Street can result in considerable congestion at peak times detracting from the overall environment and easy pedestrian movements across centre. We note that a significant number of respondents (42%) to the Town Council's *Vision* document called for traffic levels to be reduced by taking any "practical measures to provide alternative routes through and around the town".
- 6.100 The street paving on the High Street is generally well maintained and in good condition. The hanging baskets and other green space also add to the centre's overall attraction, particularly as part of the 'Newmarket in Bloom' displays. The new 'finger' signposts and town maps have also improved the legibility of the centre for both repeat and first-time visitors to the centre
- 6.101 The centre has a number of attractive buildings, in varying styles of architecture, and is protected almost entirely with Conservation Area designations. The key 'gateways'

to the town are also marked by the recently refurbished Cooper Memorial and the Victorian Gothic clock tower. There are, however, a number of poorer quality modern buildings, particularly the unit occupied by TK Maxx in the north eastern part of the High Street. In general, the majority of fascias are well maintained helping to provide an attractive shopping environment.

- 6.102 The Guineas Shopping Centre provides the main pedestrianised area of Newmarket, but this 1970s building is looking 'tired' and dated by modern shopping centre standards. As the Council's 2006 TCRS concluded, there is a pressing need to provide a higher quality modern shopping environment with larger shop units and improved integration and linkages to the High Street to help encourage footfall. In our judgement any improvements to the environment and quality of this shopping centre, along with the pedestrianisation of Market Street, would help to strengthen Newmarket's overall vitality and viability. Not only would it be a more attractive destination for shoppers, but the provision of larger units would also generate increased interest and demand in the centre from retailers and businesses.
- 6.103 Eighty percent of respondents to the Town Council's 'Vision' questionnaire identified that the town was "scruffy" or "untidy" in their opinion, whereas only 25% thought it was "welcoming" or "attractive". Some 70% of respondents indicated that they wanted to see the presentation of the town improved in order to encourage tourism, which is regarded as the "quickest and simplest route to economic regeneration".
- 6.104 The 2011 HTIS showed 14.3% of residents mentioned 'unattractive environment/not a nice place' as one of the things they disliked about Newmarket indicating that the level of unhappiness with the environmental quality of the town centre is not as overwhelming. However, a greater number (20.5%) identified 'attractive environment/nice place' as one of the things that they liked about the town centre.
- 6.105 The Town Council's 'Vision for Newmarket Town Centre' also identified a number of areas where Newmarket's overall environment could be significantly improved, including:
- The elimination of litter and graffiti, through more frequent street sweeping and the provision of more litter bins.
 - A requirement for fast food outlets and other operators to remove litter from outside their premises.
 - Tighter control of advertising boards by the local planning authority to help avoid street clutter.
 - Improvements to and/or the pedestrianisation of a number of key streets leading off the High Street, including Crown Walk.

CUSTOMER VIEWS & PERCEPTIONS

6.106 The results of the household and street interview survey in Newmarket provides a more detailed understanding of people's likes/dislikes of the town. Direct comparison is not appropriate as the 2006 survey asked this as part of the HTIS and the 2011 survey asked this as part of the on-street survey.

Table 6.12 What People Like/ Dislike Most About Newmarket

	2006	2011
LIKES:	% of respondents	% of respondents
Attractive environment	17%	31%
Easy to get to/ close to home or work	19%	32%
Good food/non-food shops	25%	66%
Good cafes/restaurants/publish houses	NA	7%
Good/ free parking	18%	11%
Nothing/very little	NA	15%
DISLIKES:	% of respondents	% of respondents
High levels of traffic through the centre	NA	6%
Poor range of shops	8%	43%
Car parking (location, cost)	60%	22%
Level of influence from racing industry	NA	7%
Unattractive environment	NA	14%

Source: 2006 FHDC RRCS and 2011 On-Street Survey for Newmarket.

6.107 The table above shows that there has been a general improvement in the perception of Newmarket town centre in terms of its environment. There has also been an improvement in perception of retail facilities. This may be linked to the opening of the Waitrose and the introduction of popular national retailers in the town centre, such as TK Maxx. However, the results of the 2011 on-street survey still indicate that the range of shops could still be improved.

KEY TOWN CENTRE SITES

6.108 An important indicator of the strength of the town centre is the length of time that key sites have remained undeveloped, key sites being those which are allocated within the development plan or are of significant size and are suitable for town centre uses.

6.109 In this regard, when Waitrose relocated to their new edge of centre store, TK Maxx occupied their old store within a short period of time, even though the vacated unit

does not have direct frontage onto the High Street. Other such sites identified in the town centre include:

- Land to the north of **Exeter Road** has been developed for a new restaurant and retail unit and is occupied by Prezzo and Bathstore;
- **Market Square** has extant permission for an extension to the Guineas Centre to include a 1,486 sq.m. retail unit and six kiosk-style retail units facing onto retained areas of the existing Market Square car park following the recent grant of an extension of timeline for implementing full permission granted in April 2008 (reference F/2011/0055/EOT);
- **Reynolds House, Fitzroy Street/High Street** - partially occupied by Fitzroy House, a small dwelling house dating from 1865, and also the site of several mature trees. The site is currently being developed as 'Fitzroy's Yard' for housing by Kier;
- **Former Technical Institute/Conservative Club** - the site has been partly redeveloped and now comprises a 75-bed Premier Inn hotel. The remaining existing detached property has planning permission for a minor extension and change of use to provide two new A-class retail units of 4447 sqm and 109 sqm respectively (reference F/2009/0163/FUL). The former Conservative Club is currently under offer through Carter Jonas and Savills;
- **All Saints Road Snooker Centre** - the former snooker centre is currently being redeveloped to accommodate a residential scheme of fourteen units (reference F/2009/0322/FUL).

SUMMARY

6.110 The updated health check assessment confirms Newmarket is still a vital and viable centre, despite the impact of the economic recession on the retail property sector and the UK's high streets. The updated assessment shows that:

- Although vacancy levels have increased since 2006, they still remain below the national average.
- There are no significant clusters of vacancies in the town centre to suggest that certain areas or streets are failing as shopping locations, albeit The Guineas does have more vacancies than would be expected of a central shopping centre in a prime town centre location.
- There is an above average representation of comparison units.
- There is a relatively good mix of multiple and independent specialist retailers.

6.111 Overall Newmarket provides its local shopping and rural catchment population with a good range of shopping facilities typically found in a centre of its size and position in the retail hierarchy.

6.112 In terms of the weaknesses in its retail offer and composition the evidence shows that:

- There is no major department store to anchor the town's shopping offer.
- Retailer requirements, Prime Zone A rents and yields have fallen back considerably since 2007; although this is mainly explained by the impact of the recession on the retail property sector.
- The Guineas Shopping Centre is 'tired' and dated by modern standards, and does not provide the larger shop units required by the majority of national multiples. The centre also has several vacancies despite its proximity in the heart of the town centre.
- The town centre has not benefitted from significant new investment in its retail offer for a number of years.
- Other centres in the wider sub-region are competing for shoppers who live in Newmarket's 'natural' catchment area and have benefitted from significant new retail investment and development over the last decade.
- The centre's twice weekly street market has diminished over recent years in terms of the number of stalls and the variety of its offer.
- There are a limited number of 'family entertainment facilities' in the town, specifically a cinema, to help generate a more attractive and diverse early evening and night time economy.
- The number of licensed premises and nightclubs in the town centre are perceived as creating high levels of anti-social disorder and crime, which may be reducing the attraction of the town to other potential evening visitors once the shops close.
- Although many thousands of people visit the popular meetings at the two large racecourses just outside the town centre every year and many pass by on the A11 and A14 each day, relatively few people visit the town centre for its shops and facilities, apart from the pubs and nightclubs.

6.113 The refurbishment or redevelopment of The Guineas Shopping Centre remains a priority for the town centre, as there appear to be limited opportunities to significantly extend the centre's existing retail offer. This is also supported by the Town Council in the '*Vision for Newmarket Town Centre*'. Any improvements to the scale and quality of the shopping centre's retail offer, including the provision of larger units, would significantly improve Newmarket's overall vitality and viability. It would also help to strengthen the centre in the face of growing competition in the wider sub-region.

- 6.114 An attractive, lively market would encourage more people to visit the town centre and this in turn would benefit existing shops and businesses in terms of linked trips and 'spin off' expenditure. This is identified as a priority by the Town Council's '*Vision for Newmarket*' (April 2011) for the improvement and regeneration of the town centre, with comparisons made with the success of other markets in Ely and Bury St Edmunds. Subject to finding a suitable location, relocation of the market to the High Street may help to bolster footfall to the benefit of both market stalls and existing High Street businesses.
- 6.115 Difficulty to park their cars was regarded by some people as a key issue in Newmarket, but the introduction of short stay car parking charges could help to improve this problem.
- 6.116 Finally, it is clear that the horse racing industry is a unique attraction for the town centre. There should therefore be significant potential to enhance the town centre's retail and leisure offer, specifically its cafes and restaurants, on the back of the horse racing industry. There would also appear to be potential for more visitor and tourist accommodation, ranging from hotels to guest houses and self catering accommodation.

7.0 HEALTH CHECK: BRANDON, MILDENHALL & LAKENHEATH

- 7.1 This section sets out the key findings of the health check assessments for the two market towns of Mildenhall and Brandon, and the key service centre of Lakenheath.
- 7.2 The evidence available for these three centres is more limited than for Newmarket. As a result we have drawn on a variety of different sources to help inform our qualitative assessment; principally the recent audits of the centres conducted by Forest Heath District Council and Strategic Perspectives.
- 7.3 Our assessment has been prepared in accordance with the key performance indicators (KPIs) sets out in the PPS4 *Good Practice Guidance*, although it principally focuses on the following key measures of each centre's vitality and viability:
- The location, physical characteristics and layout of each centre;
 - The retail profiles;
 - The diversity of uses;
 - The number of vacant units and vacancy levels;
 - The key retailers represented in the centres;
 - The quality of the shopping environments; and
 - The overall accessibility of the centre by different modes, including car parking provision.
- 7.4 The following sets out the key findings of our assessment.

MILDENHALL

- 7.5 Mildenhall is a historic town located in the centre of the District and is approximately 13 km north east of Newmarket and 8 km south of Lakenheath.
- 7.6 The Adopted Core Strategy (May 2010) identifies Mildenhall (along with Newmarket and Brandon) as a market town, although Policy CS 1 specifies that both Mildenhall and Brandon function as "*small market towns*". Until relatively recently, both towns have been relatively small and primarily agriculturally focused, with major development only starting after a significant influx of people in the 1960s following an agreement with the Greater London Council to move families here to tackle London overspill. According to the 2001 Census Mildenhall has a population of 9,906.
- 7.7 The centre is located within close proximity to the main road network, with the A11 connecting Mildenhall with Newmarket. The A1065 travelling north also links the centre with Brandon. Mildenhall is served by approximately 240 car parking spaces, primarily located in the south east of the centre.

- 7.8 The town also has a thriving industrial estate close by which is growing in popularity due to the recent arrival of Marshalls SV who have taken occupation of the 11,012 sqm Galaxy building in Hampstead Avenue. Marshalls SV is under contract to support MAC (UK) to manufacture 6,500 support vehicles for the British Armed Forces. In addition to their own employees this contract has created 50 local jobs in Mildenhall. Mildenhall is home to the USAF military base and the town centre is regularly frequented by personnel and their dependants.
- 7.9 The centre's retail offer and main town centre uses are principally concentrated along the High Street, St Andrew's Street and Market Street. The Precincts, which is a managed shopping centre that opened in the 1970s, is located in the area surrounded by these streets.
- 7.10 Market Place provides the key focal point for the centre, with a weekly market held on Fridays. The market stalls vary from week to week, as does the range of choice of goods sold. Typically the market sells fresh groceries, usually sourced from the local area, as well as fish, flowers, clothing, household products and a range of other products.

Retail & Use Class Profile

- 7.11 The table below shows the broad changes in Mildenhall's retail profile between 2004 and 2011. The retail profile at 2004 is based on the evidence set out in the 2006 FHDC RTCS and the most recent profile is based on audits conducted by both Forest Heath District Council and Strategic Perspectives.

Table 7.1 Changes in Mildenhall's Retail Profile, 2004 - 2011

	2004			2011		
	Outlets	%	UK Base	Outlets	%	UK Base
Convenience	8	8.42	9.17	6	6.4	9.0
Comparison	40	42.11	47.83	29	31.2	41.7
Services	34	35.79	31.38	45	48.4	34.9
Vacant	12	12.63	10.26	12	12.9	13.2
Miscellaneous	1	1.05	1.37	1	1.1	1.2
TOTAL:	95	100	100	93	100	100

Source: Experian Goad Centre Report (March 2004) / 2011 audits conducted by FHDC and SP.

Notes: Figures may not sum to 100% due to rounding. The categorisation of retail and service businesses in 2011 is based on the same definitions as used by Experian Goad to inform the preparation of their Summary Reports for centres. In this case the 'miscellaneous' category includes post offices, employment offices, etc.

- 7.12 In 2004, Experian identified that there were 95 retail and service outlets in the town centre, trading from a total estimated ground floor floorspace of 14,771 sqm. In 2011 we estimate that there were 93 outlets. Although there has been minimal change in

the number of retail and service units in the centre since 2004, the scale of floorspace will have increased due to the development of the new Sainsbury's store at Recreation Way.

- 7.13 Based on the Council's audits of Mildenhall, which matches the extent of the proposed PSA, we have also been able to assess the centre's broad Use Class Profile by number of outlets and total representation.

Table 7.2 Mildenhall's Use Class Profile – Number of Outlets (2011)

	A1	A2	A3	A4	A5	C1	D1	Sui	Vac	Total
High Street	13	5	4	2	2	1	1	-	3	31
Market Place	15	5	4	-	3	-	3	1	2	33
Mill Street	3	2	-	-	-	1	1	2	4	13
King Street	2	1	1	-	-	-	2	1	1	8
St Andrew's St	2	1	1	-	-	1	-	-	2	7
Other	9	9	3	-	-	0	2	5	-	28
TOTAL:	44	23	13	2	5	3	9	9	12	120

Source: Forest Heath District Council 2011 Survey.

Notes: The Council's audit of total outlets differs from the Experian Goad audit for a number of reasons including, *inter alia*, the different definitions of centre boundaries and the different uses/ outlets categorised.

Table 7.3 Mildenhall's Use Class Profile – % of Outlets (2011)

	A1	A2	A3	A4	A5	C1	D1	Sui	Vac	Total
High Street	41.9%	16.1%	12.9%	6.5%	6.5%	3.2%	3.2%	0.0%	9.7%	100%
Market Place	45.5%	15.2%	15.2%	0.0%	6.1%	0.0%	9.1%	3.0%	6.1%	100%
Mill Street	23.1%	15.4%	0.0%	0.0%	0.0%	7.7%	7.7%	15.4%	30.8%	100%
King Street	25.0%	12.5%	12.5%	0.0%	0.0%	0.0%	25.0%	12.5%	12.5%	100%
St Andrew's St	28.6%	14.3%	14.3%	0.0%	0.0%	14.3%	0.0%	0.0%	28.6%	100%
Other	32.1%	32.1%	10.7%	0.0%	0.0%	0.0%	7.1%	17.9%	0.0%	100%
TOTAL:	36.7%	19.2%	11.7%	1.7%	3.3%	2.5%	7.5%	7.5%	10.0%	100%

Source: Forest Heath District Council 2011 Survey.

- 7.14 As the tables show, the majority of Mildenhall's Class A1 (retail) uses are concentrated on the High Street and in Market Place (including The Precincts).
- 7.15 Based on the Council's own audits, it is apparent that there has been a decline in Class A1 (retail) uses over the last decade. For example, in 2000 some 55 outlets were

classified as Class A1 uses and the number fell slowly to 51 in 2007, followed by a more marked decline to 44 in 2011.

- 7.16 In comparison, the number of Class A2 outlets has increased from 14 to 23 between 2000 and 2011.
- 7.17 The number of places to eat and drink (Class A3-A5 uses) in Mildenhall currently stands at 20 outlets, which is higher than the 11 recorded by the Council in 2000.

Diversity of Uses

- 7.18 The following describes the key changes in Mildenhall's convenience, comparison and service business offer since 2004 in more detail.

Convenience goods

- 7.19 The centre currently has 6 food and convenience outlets, which is less than the 8 identified by the 2004 survey. Current provision represents 6.4% of total outlets, which is below the Experian Goad national average of 9.0%. However, it is important to note that Mildenhall's day-to-day offer is supplemented by the weekly market.
- 7.20 A more detailed analysis of the centre's convenience offer indicates that there are no independent fishmongers, bakers or off licences. Apart from McColl's, The Old Sweet Shoppe and Barleycorn Delicatessen, Mildenhall's main convenience and food offer is found in the Co-op on King Street and the new Sainsbury's store on Recreation Way. We review these two 'anchor' stores in more detail below.
- The **Co-op** store forms part of The Precincts. It has a total estimated sales area of 553 sqm net and predominantly meets the day-to-day 'top-up' shopping needs of the local catchment population. The Co-op also has an in-store Post Office that underpins its overall attraction and performance by generating regular and linked trips and expenditure. We estimate that circa 5% of the store's total sales area is set aside for non-food retailing.
 - Up until recently, **Sainsbury's** had been trading in the town centre in the outlet on St Andrew's Street, in the southern part of the centre. This unit was previously occupied by Budgens, which opened in Mildenhall in 1986^{****}. In November 2008 planning permission was granted for a new Sainsbury's store on Recreation Way (F/2008/0268/FUL). The new store opened in March 2011 and has a gross external area of 4,084 sqm and a net sales area of 2,071 sqm, making it more than twice the size of the former store. The new store's wider offer includes bakery, fish and deli counters, along with the TU Clothing line for women and

^{****} The former Sainsbury's/ Budgens store had an estimated sales area of 943 sqm net (1,688 sqm gross) and an in-store bakery. We estimate that approximately 15% of the total sales area in this unit was set aside for non-food sales.

children. The store employs some 192 people (92 more people than the former store) and has also increased the parking spaces available to Sainsbury's and the wider town centre.

- 7.21 The former Sainsbury's unit on St Andrew's Street is now occupied by Wilkinson. The quick turnover of this unit back to operation is a positive sign and shows that the centre continues to attract new retailers.

Comparison goods

- 7.22 The number of comparison goods outlets in Mildenhall has declined by more than one-quarter since 2004, from 40 to 29 units. The town's non-food offer currently represents 31.2% of total outlets, which is below the national average of 41.7%. This fall is mainly explained by the increase in service businesses over the same period, which we consider in more detail below.

- 7.23 Further detailed analysis indicates that the centre has a limited representation of clothing and footwear outlets, apart from Jackie's Fashion at 35 High Street. The main non-food offer in the centre consists of furniture and carpet stores trading from some of the larger units in the town centre (such as, for example, Bussens & Parkin at 5 King Street, and Martins Furnishers at 28-30 High Street). There are also a number of shops selling:

- electrical goods (such as Taylor Electrical);
- charity shops (including Sue Ryder);
- cards and gifts shops;
- florists;
- opticians (including Scrivens and Boots Opticians); and
- chemists (Lloyds Pharmacy).

- 7.24 Although Mildenhall still has a relatively diverse non-food offer, the fall in the number of comparison goods outlets from 40 to 29 outlets since 2004 is a cause for concern. Furthermore, the fact that a number of the larger units in the town are currently occupied by one specific retail category (namely furniture and carpets), indicates that the centre could be vulnerable in the future if any of these businesses were to fail.

Service Businesses

- 7.25 The choice and range of service businesses in Mildenhall is relatively strong and has increased since 2004, principally at the expense of comparison goods retailing. According to the latest town centre audit, the 45 outlets represent 48.4% of total provision, which is significantly higher than the national average of 34.9%.

- 7.26 In terms of leisure services, some 10 units in 2004 were occupied by restaurant, cafe and fast food outlets, which was below the national average at that time. In 2011 we estimate that the number of outlets has increased to 18, of which 13 are cafes and restaurants (Class A3) and five are fast food and takeaway outlets (Class A5). There is a relatively good choice of places to eat and drink, ranging from two Indian, one Thai and two Chinese restaurants, to Kentucky Fried Chicken (KFC) and Dominos Pizza.
- 7.27 In terms of financial services, there are two national high street banks (Lloyds TSB and Barclays), 9 estate agents and one building society (Nationwide). Estate agent units make up less than 1% of total outlets, which is well below the national average of circa 4%.
- 7.28 Other retail services in Mildenhall include 11 health and beauty outlets (of which seven are hairdressers), two opticians (Scrivens and Boots Opticians), a Blockbuster and a Thomas Cook travel agent.

Other Uses

- 7.29 Apart from its retail and service offer, other uses in and around Mildenhall include the newly built Mildenhall Social Club; hotels; medical services; offices; swimming pool; churches; a fire station; the Mildenhall Museum; and the football club. We also note that Mildenhall has two (Class A2 betting) shops (Coral Bookmakers and Ladbrokes).

Multiple & Independent Representation

- 7.30 Apart from Sainsbury's and the Co-Op convenience store and Wilkinson mentioned above, other multiple retailers in the centre include Lloyds Pharmacy, Sue Ryder Shop, Scrivens Opticians, Boots Opticians, Blockbusters, Lloyds TSB, Barclays Bank, Thomas Cook, Ladbroke, Dominos Pizza and KFC. There are no national multiple clothing and footwear retailers in Mildenhall. This reflects its overall role and function in the District's network and hierarchy of centres.
- 7.31 Mildenhall has a good independent and specialist retail offer. This includes a butcher, an electrical store (Taylor Electrical), a video rental store, a pet shop and a number of stores selling furniture, carpets and household goods. There is also an Original Factory Shop variety store which stocks a wide range of non-food goods.

Vacancy Levels

- 7.32 The 2006 FHDC RTCS identified that there were 12 vacant units in March 2004 and this had fallen to 10 by February 2006. Of these, 7 units had been vacant since 2004. The 2006 study concluded that although Mildenhall was experiencing some difficulty in attracting new retailers, the reduction in vacant units was nevertheless a positive indicator for the centre. Since 2006 there has been an increase in vacancy levels to 12

outlets. This is equivalent to 12.9% of total outlets, which is slightly below the national average of 13.2%.

- 7.33 Our more detailed analysis of the size and location of vacant units in Mildenhall identified that there were three vacancies on the High Street, two on Market Place and four on Mill Street. Although there is no significant cluster or concentration of long term vacant units to indicate that certain streets or shopping areas are failing, we note that one-quarter of the recorded outlets (16) on Mill Street are vacant. This would appear to indicate that this more secondary shopping street does not have the necessary critical mass of 'fit-for-purpose' units to draw the necessary level of footfall and expenditure to support its retail offer. The Council may wish to consider revising their allocation of this part of the town centre from primary to secondary shopping area.

Retail Requirements

- 7.34 The 2006 FHDC RTCS identified only one requirement from the British Heart Foundation for a unit of between 56 sqm and 111 sqm in Mildenhall. The last CoStar 'Retail Focus' Report does not identify any current requirements for Mildenhall.

Environmental Quality

- 7.35 Mildenhall is an attractive place with a number of attractive buildings protected with listed buildings and conservation area designations. The overall shopping environment is mixed. Market Place provides an important 'meeting place' at the heart of the town and provides an attractive traffic-free shopping street on market days (i.e. every Friday). However during the remainder of the week this area is severed by one-way traffic flows that travel through to Kings Street, restrict pedestrian movement and generally detract from the centre's overall shopping environment.
- 7.36 Although The Precincts appears to be well managed and maintained, we agree with the overall findings of the 2006 FHDC RTCS that it is not of the highest architectural quality and is out of keeping with the historic and traditional parts of Mildenhall.
- 7.37 Notwithstanding this, the on-street survey identified that circa 19% of respondents identified 'attractive environment/nice place' as one of the things that they liked about Mildenhall, with only circa 1% identifying the environment as something that they disliked about the centre.
- 7.38 As far as we are aware, apart from the new Sainsbury's on Recreation Way, Mildenhall has not benefited from significant investment since 2006 in its shopping environment. We consider that there is an opportunity to improve the scale and quality of its retail offer, particularly focussed on The Precincts, either through refurbishment or extension.

Customer Views & Perceptions

- 7.39 The results of the household and street interview surveys, in comparison to the results of the survey undertaken in 2006, provide a more detailed understanding of people's likes/dislikes of Mildenhall.
- 7.40 In this case we have set out the responses to the 2005 household survey used to inform the 2006 FHDC RTCS with the results of the 2011 household and on-street interview surveys. Please note that direct comparison is not appropriate as the 2006 survey asked questions about customers perceptions of the centre during the household telephone survey and the 2011 survey asked this as part of the on-street survey.
- 7.41 The table below sets out the key responses to both surveys.

Table 7.4 What People Like/ Dislike Most About Mildenhall

	2006	2011
LIKES:	% of respondents	% of respondents
Attractive environment	18.1%	19.4%
Close to home	19.4%	44.4%
Good/ free parking	10.6%	15.3%
Good food shops	0%	34.7%
DISLIKES:	% of respondents	% of respondents
Shortage of (or expensive) foodstores	10%	2.7%
Shortage of (or poor range of) non-food stores	21%	30.8%
Insufficient Parking	9%	28.2%
Nothing/Very little	55%	0%

Source: 2006 FHDC RTCS and 2011 On-Street Survey for Mildenhall.

- 7.42 As shown in Table 7.4, almost 35% of respondents to the 2011 on-street survey indicated that they thought Mildenhall had a good range of food shops, compared to no respondents identifying this in 2006. This is no doubt linked with the opening of the new Sainsbury's foodstore in the town centre.
- 7.43 In contrast, almost 31% survey respondents indicated that that there was a shortage or poor range of non-food stores, which is higher than the 21% who identified this as a problem in 2006.
- 7.44 In addition, the 2011 results indicate that parking is increasingly becoming an issue, with 28% of respondents indicating that the current level of parking was insufficient.

BRANDON

- 7.45 Brandon is located in the north east of the District, approximately 26 km to the north east of Newmarket town centre, 12 km to the north of Mildenhall and 8 km to the north east of Lakenheath.
- 7.46 The Adopted Core Strategy (May 2010) identifies Brandon (along with Newmarket and Mildenhall) as a Market Town, although Policy CS 1 specifies that both Brandon and Mildenhall function as “*small market towns*”. According to the 2001 Census Brandon had a population of 8,249.
- 7.47 The main route into Brandon is via the A1065, which runs through the town and provides direct access to Mildenhall in the south and Swaffham in the north.
- 7.48 The linear High Street provides the main retail offer and stretches in a north – south direction covering approximately 200 metres. Market Hill in the south of centre also provides additional retail and leisure provision in a pedestrianised square. The main 70-space car park is located to the north of the town and a number of spaces behind the Market. This is supplemented by the Aldi car park at the north of the centre.

Retail Profile

- 7.49 The table below shows the broad changes in the number and composition of Brandon’s retail offer since 2005.

Table 7.5 Changes in Brandon’s Retail Profile

	2005			2011		
	Outlets	%	UK Base	Outlets	%	UK Base
Convenience	5	8.47	9.17	7	11.3	9.0
Comparison	20	33.90	47.83	21	33.9	41.7
Services	25	42.37	31.38	27	43.5	34.9
Vacant	8	13.56	10.26	6	9.7	13.2
Miscellaneous	1	1.69	1.37	1	1.6	1.2
TOTAL:	59	100	100	62	100	100

Source: Experian Goad Centre Report (September 2005) and audits conducted by Forest Heath District Council and Strategic Perspectives in 2011.

Notes: Figures may not sum to 100% due to rounding. ‘Miscellaneous’ includes post offices, employment offices, etc.

- 7.50 According to Experian Goad, Brandon had 59 units in September 2005 trading from 7,060 sqm of ground floor retail and service business floorspace. Based on the most recent audits of the centre we estimate that there are currently some 62 outlets.

- 7.51 Based on the Council's audits of Brandon, which cover the extent of the proposed PSA, we have also been able to assess the centre's broad Use Class Profile by number of outlets and total representation.

Table 7.6 Brandon's Use Class Profile – Number of Outlets (2011)

	A1	A2	A3	A4	A5	C1	D1	Sui/ Other	Vac	Total
High Street	21.5	6	2	1	6.5	-	2	7	4	50
Market Hill	6	1	0.5	1	0.5	2	-	1	1	13
London Road	5	1	2	-	-	-	-	1	1	10
Other	1	0	2	1	-	-	4	2	0	10
TOTAL:	33.5	8	6.5	3	7	2	6	11	6	83

Source: Forest Heath District Council 2011 Survey.

Notes: The Council's audit of total outlets differs from the Experian Goad audit for a number of reasons including, *inter alia*, the different definitions of centre boundaries and the different uses/ outlets categorised. Please note also that some of the outlets were classified as having a dual A1/A3 and A3/A5 use.

Table 7.7 Brandon's Use Class Profile – % of Outlets (2011)

	A1	A2	A3	A4	A5	C1	D1	Sui/ Other	Vac	Total
High Street	43.0%	12.0%	4.0%	2.0%	13.0%	-	4.0%	14.0%	8.0%	100%
Market Hill	46.2%	7.7%	3.8%	7.7%	3.8%	15.4%	-	7.7%	7.7%	100%
London Road	50.0%	10.0%	20.0%	-	-	-	-	10.0%	10.0%	100%
Other	10.0%	-	20.0%	10.0%	-	-	40.0%	20.0%	-	100%
TOTAL:	40.4%	9.6%	7.8%	3.6%	8.4%	2.4%	7.2%	13.3%	7.2%	100%

Source: Forest Heath District Council 2011 Survey.

- 7.52 As the tables show, Brandon's outlets and Class A1 (retail) uses are concentrated on the High Street. Based on the Council's audits since 2005, it is apparent that the number of Class A1 shops has remained relatively constant over the last decade. For example, in 2000 some 34 outlets were classified as Class A1, this peaked at 37 in 2005 and has since fallen back slightly to the current level of 33.5.
- 7.53 The number of Class A2 outlets has remained relatively constant since 2007, although representation has fallen back from a peak of 11 in 2007.
- 7.54 The number of places to eat and drink in Brandon currently stands at 16.5, which compares with 14 outlets in 2000.

Diversity of Uses

7.55 The following describes the changes in Brandon's retail composition since 2005.

Convenience goods

- 7.56 In 2005 Brandon had a slightly below average provision of convenience goods outlets compared with the (Experian Goad) national average. The centre's main food store was a small Spar located on the High Street. The 2006 FHDC RTCS identified that the centre was facing strong competition from the new out-of-centre Tesco located to the south west of the town centre on London Road, which has a net sales area of 1,024 sqm.
- 7.57 Since 2006 an Aldi foodstore has opened on the former Co-op site. The 'deep discounter' has an estimated sales area of 950 sqm net and approximately 5% is set aside for comparison goods retailing. The household survey results show that the store does play a role in retaining main 'bulk' food purchases within Zone 3 (accounting for 10.5% of main food expenditure), however it plays a greater role in secondary (23%) and top-up (22.4%) purchases. The store also draws some (10.5%) of main food expenditure from Zone 10.
- 7.58 Brandon's convenience goods offer has increased since 2005, from 5 to 7 outlets. Its current provision of 11.3% is above the national average figure of 9.0%. The Spar (including an in-store Post Office Counter) is still trading in the town centre and other smaller independent retailers include a butcher (Meat Market), greengrocer (Mark's Traditional Greengrocer) and a bakers (David R Hyam Bakers). The centre appears to serve a mainly secondary or "top up" shopping offer for convenience goods, and plays an important role in contributing footfall within the town centre. The results of the on-street survey indicate that of those surveyed, the main purpose for visiting Brandon was for top-up food shopping (29.4%), with main food shopping identified by 8.8% of respondents.
- 7.59 Altogether, between 2006 and 2011 town centre convenience stores have increased their market share from within Zone 3, going from 5% in 2006 to 16.8% in 2011. The centre also now draws some trade from outside its immediate zone, drawing 2.8% of combined convenience goods trade from the SCA, and a 0.1% from the OCA.
- 7.60 Brandon has one out-of-centre foodstore. The Tesco on London Road opened in 2000 and has sales area of 1,024 sqm (net). The store has a range of convenience goods and a small element of comparison goods which we estimate makes up 10% of floorspace. The store appears to have increased its combined convenience goods market share within Zone 3, increasing from 16% in 2006 to 22.2% in 2011. It also draws some trade from the SCA (1.3%).

Comparison goods

- 7.61 Brandon's comparison goods offer has increased slightly since 2005, from 20 to 21 outlets. Current provision represents 33.9% of total outlets, which is below the national average of 41.7%.
- 7.62 The 2006 FHDC RTCS indicated that there were no fashion retailers in the centre. The most recent audit identified that Cinderella's has since opened at 2 Market Hill, which is a bridal boutique specialising in wedding dresses, bridal accessories and men's hire. Bumps Maternity also opened on Thetford Road in 2009 and offers recycled goods ranging from maternity wear, to infants and children's clothing and toys.
- 7.63 Brandon's other non-food offer includes:
- 2 charity shops;
 - 3 cards and gift shops;
 - 4 electrical, furniture and DIY outlets; and
 - Boots Chemist.
- 7.64 The centre has increased its comparison goods retention rate in Zone 3 since the 2006 FHDC RTCS from, growing from 2% to 10.5% in 2011.
- 7.65 Overall we consider that Brandon's non-food offer is appropriate to its overall size, role and function in the District's retail hierarchy. It has managed to maintain and strengthen its non-food offer since 2005, despite the impact of the recession. Furthermore, the addition of Cinderella's and Bumps Maternity to its overall non-food offer will have added to the centre's vitality and viability as a comparison goods shopping destination.

Service Businesses

- 7.66 Brandon has increased its service business outlets since 2005 from 25 to 27. Current provision represents 43.5% of total outlets in the town centre, which is significantly above the national average of 34.9%.
- 7.67 A more detailed analysis of the different service categories indicates that it has 6 businesses in the retail services category. Of these, 5 are classified as 'health and beauty' (including 3 hairdressers) and there is also an opticians (Helen Ashby Opticians).
- 7.68 Brandon also has a strong representation of leisure services, with 16 outlets in total. This category includes 4 cafes, 4 restaurants (Class A3) and 6 fast food/ takeaway outlets (Class A5). Following the closure of the Flintknappers Arms, the only public house in the town centre is The Bell.

- 7.69 The main financial and business services in the town centre include 4 estate agents and Barclays Bank.

Other Uses

- 7.70 In addition to the above services that are classified according to Experian Goad's definitions, our audit also identified a wider range of uses in the town centre including two bookmakers (BetFred and Ladbrokes); four surgeries (dentists and doctors); and other offices. Brandon's leisure offer and evening economy is also underpinned by Mr G's Bowling Centre, which is an 8-lane bowling complex with a 150-seat bar and restaurant.

Multiple & Independent Representation

- 7.71 The main multiple retailers in Brandon include a Boots Pharmacy, Spar, Aldi, Barclays Bank, BetFred and Ladbrokes. Overall the town has a limited multiple offer and it is mainly characterised by its smaller independent businesses. This is to be expected for a centre of its size and its role and function in the District's retail hierarchy.

Vacancy Levels

- 7.72 The number of vacant units across the centre has fallen from 8 to 7 since 2005. At the present time vacancy levels stand at 11.3%, which is below the national average of 13.2%. This is a positive sign that the centre remains vital and viable, despite the impact of the economic recession.
- 7.73 Based on the most recent audits there also appear to be no significant clusters of vacant units in the town centre. We note that 4 of the 7 vacant units have been vacant since 2007 and these are located on the High Street (i.e. numbers 18, 27 and 29) and London Road (number 21). The London Road unit is a small peripheral unit and is difficult to let because it does not attract significant footfall. Based on the Council's 2011 survey it is also apparent that 5 of the 7 vacant units are Class A1, one is A4 (former Flintknappers) and one is A5 (29 High Street).

Environmental Quality

- 7.74 Brandon shopping streets are covered by a Conservation Area and this has helped to maintain its attractive and pleasant environment. The area around Market Hill has a good quality shopping environment with well maintained shops fronts and a good mix of modern and old buildings.
- 7.75 The 2006 FHDC RTCS identified that the quality of the environment deteriorates slightly as the centre continues north along High Street, with this part containing the majority of vacant units at that time. However, the opening of the Aldi at the northern end of the High Street will have increased the footfall in this area.

7.76 The 2006 FHDC RTCS also identified that new investment in Brandon had been undertaken in partnership with Forest Heath District Council, Suffolk County Council, Brandon Communities Partnership and English Heritage. This 3-year programme was called the *Brandon Heritage Economic Regeneration* scheme (HERS) with the aim of repairing and restoring historic commercial properties to regenerate the town centre and environmental enhancements. Approximately £300,000 of the work was used to fund Historic Building Grants to commercial properties for repairs/restoration works. Other regeneration activities have also taken place with grants, advice and support being provided to local businesses.

Customer Views & Perceptions

7.77 The results of the household and street interview surveys provide a more detailed understanding of people's likes/dislikes of Brandon. As with Mildenhall, we have set out the responses to the 2005 household survey used to inform the 2006 FHDC RTCS with the results of the 2011 household and on-street interview surveys. Again, direct comparison is not appropriate as the 2006 survey asked this as part of the HTIS and the 2011 survey asked this as part of the on-street survey.

Table 7.8 What People Like/ Dislike Most About Brandon

	2006	2011
LIKES:	% of respondents	% of respondents
Attractive environment	11.7%	6.0%
Close to home	16.0%	11.9%
Close to work	7.4%	1.5%
Good/ free parking	10.6%	1.5%
Nothing/very little	NA	47.8%
DISLIKES:	% of respondents	% of respondents
High levels of traffic through the centre	NA	14.5%
Shortage of (or expensive) foodstores	14.9%	1.3%
Poor range of shops	NA	31.6%
Poor disabled access	21.3%	0%
Number of vacant units/nothing in the town	13.8%	25%
Unattractive environment	NA	5.3%

Source: 2006 FHDC RRCS 2006 and 2011 On-Street Survey for Brandon.

7.78 The table above shows that there appears to be some local dissatisfaction with the centre, with almost half of respondents identifying 'nothing/very little' that they like about Brandon. It appears that this could be linked with what is perceived as a 'poor

range of shops' which was identified by 32% of respondents to the on-street survey as something which they disliked about the centre.

LAKENHEATH

- 7.79 Lakenheath is an historic village located approximately 20 km to the north east of Newmarket and some 8 km to the north of Mildenhall. It is accessed via the B1112, which runs directly through the centre.
- 7.80 According to the 2001 Census, the centre had an estimated population of approximately 4,490. It is identified as a 'Key Service Centre' by the Core Strategy, along with Red Lodge.
- 7.81 Lakenheath's main retail and service offer is spread along the linear High Street. There is some off-street car parking located off Wings Road in the heart of the centre, although the majority of visitors generally take advantage of the on-street parking facilities.

Retail Profile

- 7.82 The table below shows the broad changes in Lakenheath's retail profile based on the evidence set out in the 2006 FHDC RTCS and the most recent audits conducted by Forest Heath District Council and Strategic Perspectives in 2011.

Table 7.9 Changes in Lakenheath's Retail Profile

	2006			2011		
	Outlets	%	UK Base	Outlets	%	UK Base
Convenience	2	11	9.17	2	8.3	9.0
Comparison	3	17	47.83	4	16.6	41.7
Services	11	56	31.38	13	54.2	34.9
Vacant	1	5.5	10.26	4	16.6	13.2
Miscellaneous	1	5.5	1.37	1	4.2	1.2
TOTAL:	18	100	100	24	100	100

Source: 2006 FHDC RTCS; and audits conducted by FHDC and Strategic Perspectives in 2011.

Notes: Figures may not sum to 100% due to rounding. 'Miscellaneous' includes post offices, offices, etc.

- 7.83 The 2006 FHDC RTCS identified that there were 18 retail and service outlets in the centre concentrated along the High Street, whereas the most recent audit identified some 24 outlets. It is clearly the smallest of the centres audited in the District by some margin.
- 7.84 In terms of its Use Class Profile, the latest audit by the Council in 2011 identified some 36 outlets and of these:

- 11 (30.6%) were defined as being Class A1;
- 2 as Class A2 (5.6%);
- 9 as Classes A3-A5 (25%);
- 1 as Class C1 (The Lakenheath Hotel);
- 5 as Class D1 (including the Library, Church and Royal British Legion); and
- 4 as sui generis.

Diversity of Uses

- 7.85 The following describes the main changes in the number and composition of Lakenheath's retail and service offer since 2006.

Convenience goods

- 7.86 The 2011 audit identified 2 convenience goods retailers in Lakenheath, which is the same number as in 2006. The main stores are a small Co-op supermarket (232 sqm net) and a small CTN/ convenience store (Lakenheath News). The Co-op on the High Street sells a relatively limited range of food and convenience items, and mainly serves the day-to-day 'top up' shopping needs of the local catchment population and passing trade. The Co-op also has a number of in-store services which contribute to its overall attraction and viability, including a National Lottery terminal and a pharmacy.
- 7.87 The results of the household survey confirm that Lakenheath does not currently have a main food shopping role. It principally serves the more frequent day-to-day needs of its local catchment population for 'top-up' food purchases.
- 7.88 However, Lakenheath's food offer will be significantly improved by the permission granted by Forest Heath District Council in 2011 to allow a new Tesco store on the Matthews nursery site. The proposed supermarket will have a gross internal area of 2,039 sqm and a net (retail planning) sales area of 1,374 sqm. Of this net sales area some 1,223 sqm will be for food and convenience goods sales and 151 sqm for comparison goods. The ranges of comparison goods proposed will predominantly comprise health and beauty, along with a small range of CDs, DVDs, books, small electrical items and kitchenware/ cookware. There is no in-store pharmacy.
- 7.89 According to Tesco the new store will create around 80 full-time and 70 part-time jobs, principally for local residents and those living in the store's catchment. The planning permission also allows for 13 dwellings on the Matthews Nursery site and adjoining land in Lakenheath. The store will have 140 parking spaces, which will also be available for shoppers who want to link their trip with other shops and facilities in Lakenheath. Vehicular access to the site will be from the High Street to the north, on land currently occupied by 12 High Street.

Comparison goods

- 7.90 There were only four comparison goods retailers in Lakenheath in 2011, which represents an increase from the three outlets in 2006. Current provision represents 16.6% of total outlets, which is substantially below the (Experian Goad) national average of 41.7%. The limited provision of comparison outlets is to be expected for a centre of its size, role and function in the District's shopping hierarchy.

Service Businesses

- 7.91 The centre's offer is mainly characterised by service businesses. The 13 outlets in 2011 represented 54.2% of total outlets, which is significantly above the national average of 34.9%.
- 7.92 The 2011 audit identified six leisure services (comprising three cafes/ restaurants and three fast food/ takeaway outlets); five retail services (including three hairdressers); and two financial and business services (Lloyds TSB and an estate agent).

Other Uses

- 7.93 Apart from its retail and service offer, we note that Lakenheath's overall vitality and viability is underpinned by a number of other key uses including a hotel, library, church, surgery and other community uses, including the Royal British Legion.

Multiple & Independent Representation

- 7.94 The only multiples in Lakenheath are the Co-op and Lloyds TSB. All the other food and non-food retailers and service business are smaller independents. This is to be expected given Lakenheath's role and function in the District's shopping hierarchy.

Vacancy Levels

- 7.95 The 2006 FHDC RTCS only identified one vacant unit in 2006. The 2011 audit found four vacant units on the High Street (numbers 20, 29, 41 and 78). The current vacancy level of 16.6% is above the national average figure of 13.2%. We advise that vacancies are monitored closely to help address any potential increases in long term vacant units over time.

Environmental Quality

- 7.96 Lakenheath is protected by Conservation Area status which has helped it to retain its traditional village character. It remains a safe and pleasant environment in which to shop. Shop fronts are generally well maintained and street paving is of a good standard. The 2006 FHDC RTCS identified that ongoing investment is likely to be required to ensure that Lakenheath retains its traditional character.

RED LODGE

- 7.97 The population of Red Lodge is much smaller than Lakenheath but growth has been considerable. According to the 2001 census, Red Lodge had a population of only 1,599 in 2001, however this has grown to circa 3,700 as of 2010 according to the most recent Experian Population Estimates. The town is mostly residential, and does not have a core shopping area. There is only one convenience goods store/post office.
- 7.98 In August 1998 the Council adopted the Red Lodge Masterplan as a Supplementary Planning Guidance which sets out the Council's overall aims and aspirations for the growth of the village. The masterplan envisions an expanded settlement of 1,500 additional homes with a new mixed use village centre (including circa 1,500sqm of retail units) to function as a focal point for the community. Other proposed facilities included a two form entry primary school, including a nursery and playing field and a new community centre.
- 7.99 Outline permission was granted by the Council in 2003 for 1,250 new houses, business land, a new primary school, sports and leisure facilities and a new Village Centre (Reference F/2000/282). Part of this permission has already been implemented. The Sports Pavilion opened in 2011 and includes a flood-lit all-weather outdoor multi-use games area with space for three tennis courts; three pitches for 5-a-side football or one pitch for 8-a-side football; and a sports field with two adult size football pitches, one junior size football pitch, one mini soccer pitch and one cricket field.
- 7.100 The outline permission allows for up to 3,000 sqm of retail floorspace in up to four shop units. The original intention was for the Village Centre to be provided as part of the RMC site on Tunpike Lane, however this site was classified as an SSSI and an alternative location on site was proposed by the developers. An updated masterplan was submitted to the Council in 2010 and was approved under Condition 4 of the original outline permission in December 2010 (Reference F/2010/0762/DC).
- 7.101 In March 2011, Crest Nicholson submitted Reserved Matters for Phase 4a of the permission to create 6 flexible commercial units and 70 two and three bedroom houses and flats. The application proposes one unit of circa 431 sqm (net) for a Class A1 convenience stores, with the remaining five units of circa 79sqm for flexible Class A1-A5 and D1 use (Reference F/2011/0025/RMA). The application was granted 7 February 2012 subject to completion of a legal agreement.
- 7.102 We consider an optimal mix of uses to help fulfil its role as a proposed Key Service Centre in Section 10.0.

ROYAL AIRFORCE COMMISSARIES

- 7.103 There are two large 'commissaries' or supermarkets on the Royal Airforce and US Airforce bases near Lakenheath and Mildenhall. Although we have been unable to

ascertain the extent and nature of the use of the commissaries by base personnel, we have assumed that, for the purposes of this assessment, that they account for approximately half of convenience goods shopping purchases for those living on the bases.

Lakenheath Commissary

- 7.104 The Lakenheath RAF base is located to the south-west of the village centre. Construction on RAF Lakenheath began in late 1940, after the British Government purchased over 1,800 acres of land reserved for the base. However, RAF Lakenheath's military affiliation predated its World War II operational use.
- 7.105 The Council has indicated that there are some 5,700 active-duty military personnel, as well as approximately 2,000 British and US civilians on the base. There are a range of retail and other facilities in a large 'commissary' or supermarket which was built on the base in the 1980s and is run by the United States Defence Commissary Agency. This 'commissary' is for on-base personnel only and is not open to the general public.
- 7.106 According to the RAF website the 'commissary' has 14 aisles and sells a range of mainly canned, dried and frozen convenience goods (albeit there is a fresh meat counter) and includes American items which are not regularly found in the UK. It does not sell fresh vegetables, dairy or breads. It also sells a limited amount of comparison goods (such as household goods, health and beauty, etc).
- 7.107 Floorspace information is not available for the 'commissary', although we estimate that it could have a net sales area of up to 2,500 sqm (net).

Mildenhall Commissary

- 7.108 The British military developed the idea to site an RAF bomber base near Mildenhall in the late 1920s. Shortly thereafter, the government purchased the land in 1929, followed by the completion of the first buildings in 1931. Three years later, RAF Mildenhall opened on Oct. 16, 1934, as one of the RAF's largest bomber stations. Today the Mildenhall base consists of U.S. Air Force personnel and civilians, as well as host nation civilian employees that work in military units and support activities like dining facilities, recreation centres, the exchange and the commissary. The commissary on the Mildenhall RAF/USAF base is smaller than Lakenheath's and sells a similar range of goods (albeit it does not have a fresh meat counter). We also understand that it is not open at weekends.
- 7.109 There are estimated to be some 354 officers, 2,600 enlisted, 423 U.S. Civilians and 769 local-national civilian employees stationed in the base. A recently published Economic Impact Statement indicated that people stationed at RAF Mildenhall boost the local economy by spending portions of their income off-base on housing and utilities, restaurants, entertainment and basic necessities. In 2010 it was estimated that military personnel stationed at Mildenhall spent \$110.9 million (all references are

USD), U.S. civilian employees spent \$14.4 million and local-national employees spent \$44.2 million on the economy.

- 7.110 RAF Mildenhall also boosts the economy of its host community by spending on locally purchased materials, supplies, equipment and contracts. In addition, recreational and other support organizations like on-base vendors and banks also make purchases that benefit the local economy. Over the studied year, RAF Mildenhall spent \$47.5 million for construction related purchases or materials and services, \$39.4 million on services, and \$18.1 million on material, equipment and supplies for daily operations.
- 7.111 Off-base spending also has an economic ripple effect as businesses hire employees to meet the demands of their RAF Mildenhall customers. This increases local employment and further benefits the local economy. During fiscal year 2010, RAF Mildenhall contributed to 1,369 indirect jobs created in the local area that value \$58.3 million.
- 7.112 The total estimated amount spent on the local economy as a result of RAF Mildenhall's presence in 2010 was \$332.7 million.

8.0 ECONOMIC RETAIL CAPACITY ASSESSMENT

8.1 This section sets out our economic assessment of the quantitative need (retail capacity) for new comparison and convenience goods retail floorspace in Forest Heath District and its main centres over the forecast period, up to 2031. This assessment updates the Council's *2006 Retail & Town Centre Study* (RTCS).

8.2 The economic tabulations accompanying the baseline comparison and convenience goods capacity forecasts are set out in **Appendix 7** and **Appendix 8** respectively.

APPROACH & EVIDENCE BASE

8.3 The CREAT^e economic model has been designed and developed by Strategic Perspectives LLP over a number of years to specifically assess the capacity for, and impact of, new retail floorspace. The Excel-spreadsheet based model draws on the advice set out in the PPS4 *Good Practice Guidance*. It adopts a transparent step-by-step approach in which all the key assumptions and forecasts can be easily tested and interrogated.

8.4 In simple terms the economic capacity approach is based on the following key steps:

- definition of a reasonable and realistic study (catchment) area and zones;
- an assessment of expenditure per capita levels and available expenditure in the study area and zones at the base year based on the 'Area Profile Reports' ('APRs') specifically produced by Experian Business Strategies ('EBS'). Please note that all monetary values are expressed in 2010 prices;
- the forecast growth in convenience and comparison goods expenditure per capita levels over the forecast period up to 2031 has been informed by the most recent forecasts prepared by EBS in 'Retail Planner Briefing Note 9' (September 2011);
- an allowance for Special Forms of Trading ('SFT') has been applied to the average per capita expenditure levels at the base year and over the forecast period. This has also been informed by the latest research published by EBS;
- estimates of the current population at the base year (i.e. 2011) and population projections over the forecast period up to 2031 have been derived from the EBS 'Area Profile Reports' ('APRs');

- the assessment of the benchmark turnover for convenience goods for existing centres, superstores and other convenience goods floorspace at the base year, informed by a number of sources^{§§§§§};
 - the assessment of the 'potential' (or 'actual') turnovers of all existing comparison and convenience goods retail floorspace in the District area and wider defined study (catchment) area based on the market share analysis informed by the household survey results;
 - an allowance for the growth in the 'productivity' (or 'efficiency') of existing floorspace, in accordance with advice set out in the PPS4 *Good Practice Guidance*;
 - the forecast growth in the 'potential' turnover of existing centres and stores over the forecast period is based on a *constant market share* approach.
- 8.5 To assess residual expenditure capacity, projected growth in the 'benchmark' turnover of existing centres/stores is subtracted from the forecast growth in 'potential' turnover. Subtracting the likely forecast turnover of existing commitments results in total expenditure capacity in the catchment area over the forecast period. To convert total expenditure capacity to physical floorspace, an appropriate average sales density (£ per sqm) is applied to the residual expenditure to convert this figure into the potential capacity for new convenience and comparison goods retail floorspace over the forecast period (i.e. at 2016, 2021, 2026 and 2031).
- 8.6 The following provides a brief overview of the key baseline assumptions and forecasts underpinning the retail capacity assessment based on the detailed economic tabulations set out in Appendices 9 & 10.

POPULATION & EXPENDITURE GROWTH

Study Area Population and Projections

- 8.7 Table 1 (Appendix 7 & 10) sets out the base year population for each zone and the projections to 2031. Table 2 sets out the base year (2011) and population projections for the communal populations in Zones 1 and 3 which can be attributed to the expat community living on either RAF Mildenhall (in Zone 1) or RAF Lakenheath (in Zone 3). Together, Tables 1 & 2 show that the total study area population of 295,607 in 2011 is projected to increase to 361,368 by 2031 (+22.2%).
- 8.8 In the District's Core Catchment Area (CCA) (Zones 1-3), the total population of 98,438 in 2011 represents 33.3% of the total study area population and according to EBS projections will increase to 120,434 by 2031 (+22.3%).

^{§§§§§} These include, inter alia, company average sales densities (i.e. £ per square metre) published by Mintel (UK Retail Rankings) and Verdict Research (where available); centre health checks; and other published retail studies.

Average Expenditure Levels

- 8.9 The EBS 'Area Profile Report' ('APR') indicates that average **convenience goods** expenditure per capita^{*****} levels in 2011 range from £1,645 in Zone 3 to £2,052 in Zone 7 (2010 prices). This compares with the national average expenditure figure of £1,712 per capita in 2011 (2010 prices). Expenditure per capita levels in the study area are only below the national average in Zone 3.
- 8.10 For **comparison goods**, average expenditure levels across the study area range from £2,355 in Zone 5 to £3,155 in Zone 7. These levels compare with the national average of £2,942 per capita in 2011 (2010 prices). Overall, expenditure per capita levels in the study area are below the national average figure in Zones 1, 3 and 5.
- 8.11 For the purposes of this assessment, we approximate the amount of expenditure which we expect could arise from residents of the District's two RAF bases. In the absence of any official data from the US Air Force, we have estimated average expenditure per capita figures of base residents based on current exchange rates (1USD:0.65GBP) and expenditure levels by District residents. We have assumed that approximately 50% of RAF resident convenience goods expenditure and 60% of comparison goods expenditure could be spent 'on the economy' (i.e. off of the Bases).

Special Forms of Trading (SFT)

- 8.12 It is common practice for retail assessments to make an allowance for expenditure associated with non-store retail sales at the base year and over the forecast period. SFT is made up of purchases that generally occur outside of shops (such as, for example, via mail order, vending machines, market stalls and the Internet). Notwithstanding this, it is important to note that Internet-based retail sales include sales by both bricks-and-mortar retailers and wholly Internet-based businesses. Therefore part of e-tailing's increasing share of SFT sales is sourced directly from stores rather than from warehouses, principally in the grocery sector (i.e. entire orders over the Internet are generally processed through local stores). As a result, retail floorspace is still needed to support the growth in Internet sales.
- 8.13 Based on recent research evidence published by EBS, we have made an informed assumption as to the potential changes in the market share of SFT for both food and non-food expenditure over the forecast period. Given the different forecasts relating to the take-up of Internet shopping over the medium to long term, we advise the Council that the growth in the market share of on-line sales and SFT could be higher than we forecast. We therefore strongly recommend that the Council regularly

***** Inclusive of Special Forms of Trading (SFT).

monitors the research relating to the growth in e-tailing and updates the forecast growth rates when necessary.

Expenditure Growth

- 8.14 The latest EBS convenience and comparison goods expenditure growth forecasts take into account the impact of the credit 'crunch' and economic downturn on retail spending over the short, medium and longer term (see **Appendix 9**). As a result the latest forecasts are more pessimistic than previous forecasts and (historic) trend-based projections.

Table 8.1 Expenditure Growth Forecasts (% per annum)

Year	Convenience Goods	Comparison Goods
2008	3.9%	-1.4%
2009	-0.5%	-2.4%
2010	0.1%	0.8%
2011	0.5%	-0.3%
2012	1.6%	-0.4%
2013	2.1%	0.5%
2014 - 2018	3.0%	0.5%
2019 - 2031	3.0%	0.6%

Source: Experian Business Strategies 'Retail Planner Briefing Note 9' (September 2011).

- 8.15 Growth over the last 15 years has largely been fuelled by easy access to credit (the so-called credit boom) and the unprecedented growth in the housing market. However, most forecasters now broadly agree that economic growth in the post-recessionary period will not be as strong. Consumer spending growth over the longer term will therefore be lower than previous historic levels.

Total Available Expenditure

- 8.16 The total growth in available expenditure for convenience goods (see Table 5: Appendix 7) and comparison goods (Table 5: Appendix 8) is derived from the EBS population and expenditure growth forecasts. The tables show that:
- **convenience goods** expenditure across the study area will increase by +£168.2m (+31.5%) between 2011 and 2031. Within the CCA only the forecast growth over the development period is +£54.5m (+31.7%), growing from £171.9m in 2011 to £226.4m by 2031; and
 - **comparison goods** expenditure is forecast to increase by over 110.2% (+£891m) within the study area from £808.4m in 2011 to £1,699.4m by 2031. Within the CCA the forecast expenditure growth is +£286.6m (+111.5%), which represents some 32% of total growth within the wider study area.

- 8.17 The tables show that the forecast growth in comparison goods expenditure significantly outstrips convenience goods expenditure growth. As we demonstrate below, this has direct implications for the level of residual expenditure available to support new retail floorspace in these different retail categories.

FLOORSPACE ESTIMATES

- 8.18 The floorspace estimates for existing comparison and convenience goods retailing in the District have been derived from a variety of sources⁺⁺⁺⁺⁺. The aggregated sales areas for the main study centres and out-of-centre shopping locations are set out in Table 4 (Appendix 7) for convenience goods and Table 6 (Appendix 8) for comparison goods retailing.
- 8.19 The scale of the out-of-centre convenience and comparison goods retail floorspace within the District and across the wider catchment area is briefly reviewed below.
- 8.20 With regard to the out-of-centre convenience goods floorspace, we estimate that the District's total sales area is some 3,972 sqm (net) (see Table 4: Appendix 7). The most significant out-of-centre superstores in terms of floorspace and turnover are operated by Tesco (at Fordham Road, Newmarket & London Road, Brandon) and Asda (Studlands Retail Park).
- 8.21 In terms of the District's retail warehouse provision, the retail parks and standalone retail warehouses have a total estimated sales area^{*****} of 5,707 net (see Table 6: Appendix 8). This is comprised almost entirely by the Studlands Retail Park, which is the only significant out-of-centre shopping location in the District.

'BENCHMARK' TURNOVER LEVELS

- 8.22 The next stage in our analysis involves an assessment of the benchmark turnovers of the existing convenience and comparison goods floorspace at the base year.

Convenience Goods

- 8.23 The average turnover to floorspace sales densities of grocery operators and other convenience goods floorspace have been informed by the company averages published by Mintel ('*UK Retail Rankings*') and Verdict Research. The benchmark convenience goods turnovers for the main centres and foodstores in the District are set out in Table 4 of Appendix 7.

⁺⁺⁺⁺⁺ Sources include the latest IGD Stores Database; the Trevor Wood Retail Warehouse Database (2010); the Experian Goad 'Centre Summary' reports; recent planning applications and retail assessments; the latest Council town centre audits and floorspace estimates; and our own research.

^{*****} Includes non-food floorspace in out-of-centre foodstores.

- 8.24 In summary, we estimate that Newmarket town centre's convenience goods retailing is achieving a total benchmark turnover of £29.7m in 2011
- 8.25 In comparison, Brandon is estimated to be achieving a total turnover of £6.2m, Mildenhall £25.6m, and Lakenheath £0.5m. The high total 'potential' turnover of Mildenhall is mostly attributed by the large Sainsbury's store and its important role in providing for the convenience needs of the town and surrounding area.
- 8.26 The table shows that the turnover of out-of-town convenience goods outlets in Newmarket is almost double the turnover of convenience goods floorspace in the town centre (£55.2m in 2011)

Comparison Goods

- 8.27 We have not estimated benchmark turnovers for the District's comparison goods provision. This is due to lack of robust information regarding the average sales performances of individual businesses in the base year. We therefore do not consider it appropriate to benchmark projected comparison growth against average sales turnovers or densities.

Productivity Growth Rates

- 8.28 The benchmark turnover levels are projected forward to 2031 assuming an allowance for some claim on spending growth by existing retailers and floorspace due to increased 'productivity' ('efficiency') in their trading performance. This is in accordance with advice set out in the PPS4 *Good Practice Guidance*.
- 8.29 The productivity growth rates adopted for the purpose of this economic assessment have been informed by research published by EBS. These have then been adjusted to reflect our own assumptions in relation to the prevailing economic climate at the national and local level, as well as our assessment of the likely performance of existing floorspace, shops and stores in the District. The following productivity rates have been applied:

Table 8.2 Applied Productivity Rates (% per annum)

Year	Convenience Goods	Comparison Goods
2008 - 2010	0.0%	0.0%
2011	0.0%	0.3%
2012	0.0%	0.8%
2013	0.2%	1.0%
2014 - 2018	0.2%	1.5%
2019 - 2031	0.3%	1.5%

Source: SP estimate.

- 8.30 Although we consider that these growth forecasts are realistic and robust, it is important to note that individual centres, stores and shopping facilities will achieve higher and/or lower growth depending on a range of trading factors, including location and the size and quality of the retail floorspace.

MARKET SHARE ANALYSIS

- 8.31 The market shares derived from the household survey are a key input to the economic capacity assessment. The market share analysis was described in some detail in **Section 5.0** and the detailed tabulations are set out in **Appendix 5** for convenience goods shopping and **Appendix 6** for comparison goods.
- 8.32 These market shares have been inputted into the CREAT^e model and are briefly described below.

Convenience Goods

- 8.33 For convenience goods shopping Table 7 (Appendix 7) summarises the market shares for all food shopping trips across the 'Core Catchment Area' (CCA). Tables 8 & 9 set out the market shares for the 'Secondary' (SCA) and 'Outer' (OCA) catchment areas respectively.
- 8.34 The tables show the overall attraction and strong market share of the District's out-of-centre foodstores. For example, the out-of centre stores are achieving a total market share of 36.4% from the CCA, compared to just 14.3% for Newmarket town centre's food and convenience stores.
- 8.35 Overall, the results of the HTIS show that within the CCA, 71% of convenience goods shopping expenditure is being retained within the District. The remainder of expenditure (28.8%) 'leaks' primarily to the competing centres of Thetford (13.2%) and Bury St. Edmunds (8.3%).
- 8.36 The results of the HTIS also show that the District draws an element of convenience goods expenditure from both the SCA (25.3%) and OCA (2.7%). Newmarket town centre accounts for 5.4% of convenience expenditure attracted from the SCA and 1.3% from the OCA. The remainder of additional expenditure diverted to the District from the SCA is mainly to existing out-of-centre facilities (13.6%). However an element of this is retained by Brandon Town Centre (3.0%) and Mildenhall Town Centre (2.8%) .

Comparison Goods

- 8.37 The market shares for non-food shopping are set out in Tables 8-10 of Appendix 8. These shares have been derived from the analysis of shopping patterns for the eight different categories of comparison goods expenditure surveyed as part of the 2011 HTIS, weighted by the expenditure per capita levels for each category.

- 8.38 Appendix 6 sets out the detailed market shares derived from the results of the 2011 HTIS. Looking in more detail at market share levels within the CCA, Table 1 shows that Newmarket town centre is estimated to have a market share of 12.3% in Zone 1, 42.2% in Zone 2 and 2.3% in Zone 3. This is higher than the market share identified by the 2006 household survey (i.e. 10.2% in Zone 1, 40.0% in Zone 2 and 2.2% in Zone 3), which is a positive indicator of the town centre's overall trading performance.
- 8.39 Comparison goods market shares for Brandon and Mildenhall have also improved since 2006. In Brandon, the retention rate for comparison goods expenditure within Zone 3 has grown from 1.7% recorded in 2006 to 10.6% in 2011. In Mildenhall, market shares have grown in both Zone 3 (from 7.3% in 2006 to 8.9% in 2011) and Zone 1 (from 1.1% in 2006 to 2.0% in 2011).
- 8.40 The District's out-of-centre non-food floorspace is achieving an estimated market share of 5.7% within the District. This means that, in total, the District is currently retaining 34.9% of comparison goods expenditure within the District. The remaining 65.1% of comparison goods expenditure is drawn to other competing centres outside of the District, including Bury St. Edmunds (33.1%), Cambridge (17.1%) and Thetford (10.1%).
- 8.41 The District also draws comparison goods expenditure from the SCA (16.7%) and OCA (1.2%). Unlike convenience goods (where the majority of expenditure is attracted to out-of-centre facilities), Newmarket town centre attracts the largest percentage of comparison expenditure coming into the District from both the SCA (10.7%) and OCA (0.9%). Brandon and Mildenhall also draw an element of comparison goods expenditure from the wider study area, however this is minimal (less than 1% each).

TRADE DRAW ESTIMATES

- 8.42 In order to provide a more realistic assessment of the turnover performance of the District's main centres and stores it is necessary to consider whether they currently draw shoppers and expenditure from beyond the defined study area. As the *Practice Guidance* identifies, it is widely accepted that the trade draw of centres, stores and shopping facilities is a function of their location, size, range, quality and attraction, compared with the competitive influence of other centres and stores.
- 8.43 For the purpose of our assessment we have assumed that Newmarket Town Centre will draw an additional 5% of its convenience and comparison goods total turnover from outside the defined study area. This is based on the fact that it functions as a major commercial and visitor destination based around the horse racing courses and industry. We therefore consider that it will benefit from additional retail expenditure generated by visitors, tourists and others who live outside the defined study area.

- 8.44 For the purpose of our assessment we have assumed that the District's smaller centres and larger superstores and retail warehouses do not draw any additional turnover from beyond the defined study area.

POTENTIAL TURNOVER LEVELS

- 8.45 Table 16 sets out the total potential turnover for convenience goods (Appendix 7) and comparison goods (Appendix 8) floorspace respectively, based on the market share and trade draw assumptions.

Convenience Goods

- 8.46 In relation to convenience goods, Table 16 (Appendix 7) shows that the out-of-centre floorspace within the CCA has a combined potential turnover of £74.2m compared with a benchmark turnover of £55.2m. The evidence shows that this difference is largely accounted for by the Tesco at Fordham Road, which is trading £23.8m above national company benchmark levels. The Asda at Studlands Retail Park appears to be trading below national benchmark levels. Other out-of-centre floorspace appears to be trading at around benchmark levels.
- 8.47 Newmarket town centre has a potential convenience goods turnover of £33.8m compared with benchmark turnover of £29.7m. The survey results therefore indicate that the town centre is trading slightly above its benchmark level.

Comparison Goods

- 8.48 For comparison goods, Table 16 (Appendix 8) shows that the town centre is estimated to be achieving a potential turnover of almost £79.0m in 2011. Together, comparison goods floorspace within the District's centres is estimated to be achieving a potential turnover of £96.7m. In comparison, the retail warehouse floorspace in the District is achieving a potential turnover of £20.5m.

RETAIL COMMITMENTS

- 8.49 The Council has identified two commitments^{§§§§§} in the District for new convenience (see Table 7, **Appendix 7**) and comparison goods floorspace (see Table 7, **Appendix 8**):
- A 1,379 sqm (net) Tesco store on the Matthews Nursery Site, Lakenheath (Reference F/2010/0338/FUL), of which approximately 89% of net sales area will be devoted to convenience goods.; and

^{§§§§§} Floorspace over 500 sqm either with planning permission or under construction or with resolution to grant planning permission subject to the signing of a Section 106 (as at November 2011).

- A 1,846 sqm (gross) extension to The Guineas Shopping Centre comprised of one large unit and six small kiosk style units. For the purposes of this assessment, we have assumed that implementation of the permission will result in an additional 1,661 sqm (net) comparison goods floorspace.

CONVENIENCE GOODS CAPACITY

- 8.50 Table 17 (**Appendix 7**) sets out the key steps in our assessment of the residual expenditure available to support new convenience goods floorspace in the CCA (i.e. covering the District).
- 8.51 The forecast capacity arises from the growth in expenditure up to 2031, after making an allowance for the growth in the 'productivity' of existing floorspace and the take-up of expenditure by new floorspace commitments.
- 8.52 Capacity can also arise from the difference between the 'potential' and 'benchmark' turnovers of existing floorspace. As the *Practice Guidance* states the "...extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform qualitative need considerations. For example, it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality" (paragraph 3.16).
- 8.53 Overtrading can often be regarded as an indicator of qualitative need where it results in conditions of overcrowding and/or congestion in stores. This is normally an indication that the store cannot adequately cope with the existing level of consumer demand and footfall. In other words 'overtrading' occurs when there is an imbalance between demand (i.e. available expenditure) and supply (i.e. existing floorspace capacity). However, as the *Practice Guidance* concludes:
- "...the term overtrading is still frequently misunderstood, and where existing services are claimed to be overtrading this should be backed up by corroborating evidence such as overcrowding and congestion rather than simply by comparison with a retailer's company average".*
- 8.54 In the case of Forest Heath our qualitative assessment of the existing stores has identified that no stores are overtrading to the extent where there is a negative impact on customer experience.
- 8.55 The baseline assessment follows a standard **constant market share approach**. It is important to note that this approach does not model the potential uplift in market shares and increase in retention levels that could possibly occur within catchment areas following the development of new retail floorspace.
- 8.56 The following briefly explains each step in the economic capacity assessment for Newmarket (see Table 15: Appendix 7).

- **Step 1:** the total existing convenience goods sales area in the District is 12,822 sqm net (derived from Table 6, Appendix 7).
- **Step 2:** identifies the total potential turnover of all existing convenience goods floorspace at 2011 (Table 16). The growth in the potential turnover of existing floorspace up to 2031 is a function of applying the baseline market share to the growth in total available expenditure.
- **Step 3:** sets out the total benchmark turnover of existing convenience goods floorspace at 2011 (Table 6). It is assumed that the turnover of existing floorspace will achieve a 'productivity' growth over the forecast period as specified above in Table 8.2.
- **Step 4:** sets out the forecast residual expenditure potentially available to support new convenience goods floorspace over the forecast period (i.e. the difference between the growth in the benchmark and potential turnovers).
- **Step 5:** identifies the forecast convenience goods turnover of all committed floorspace, as derived from Table 7.
- **Step 6:** shows the net residual expenditure available to support new convenience goods floorspace after taking account of all new commitments.
- **Step 7:** forecasts the capacity for a major new superstore operator (such as, for example, Sainsbury's, Tesco, Asda, Morrisons and Waitrose) and/or deep discounter floorspace in the District. We have assumed that a major grocery operator will achieve an average sales density of £12,000 per sqm in 2011, increasing to £12,627 per sqm by 2031. For a smaller supermarket and/or deep discounter this is based on the operator achieving an average sales density of circa £6,000 per sqm in 2010 rising to £6,313 per sqm by 2031.

8.57 The table below summarises the residual expenditure and convenience goods capacity forecasts based on the different foodstore formats

Table 8.3 Forest Heath District: Convenience Goods Capacity for Major Foodstore or Supermarket/Deep Discounter

	2016	2021	2026	2031
Residual Expenditure (£m):	£23.5	£35.3	£46.0	£57.5
Floorspace Capacity (sqm net):				
Major food superstore: OR	1,941	2,880	3,696	4,555
Supermarket / Deep Discounter:	3,882	5,760	7,392	9,109

Source: Table 15, Appendix 7 – Step 7

- 8.58 The table shows that there is capacity for between 2,000 – 3,000 sqm (net) major new 'superstore format' floorspace over the short to medium term, growing to 4,555 sqm in the long term.
- 8.59 For smaller supermarkets and/ or 'deep discounter' formats the forecasts indicate capacity for almost 6,000 sqm net by 2021, increasing to 9,109 sqm net by 2031.
- 8.60 The survey results and market share analysis has confirmed that there is capacity for between 4,555 – 9,109 sqm of convenience goods floorspace in the District up to 2031, depending on the turnover of proposed floorspace. This compares closely to the 5,700 sqm (net) of convenience goods floorspace need set out in Policy CS11 of the (which was based on the conclusions of the 2006 Study which assumed the turnover of new convenience floorspace would be circa £10,000/sqm. Appendix 11 and Section 10.0 consider in more detail how this identified need could be accommodated.

COMPARISON GOODS CAPACITY

- 8.61 Table 17 (**Appendix 8**) set out the key steps in our assessment of the residual expenditure available to support new comparison goods floorspace in the District. The step-by-step approach is the same as assumed for convenience goods capacity.
- 8.62 The forecast residual expenditure has been converted to a net retail sales area based on the policy assumption that this new floorspace should be directed to town centres first. In this context we have assumed that an average sales density for new high quality comparison goods retail floorspace of circa £5,500 per sqm in 2011 (2010 prices). This is informed by our understanding of the average turnover levels achieved by large modern floorspace formats in centres of a similar size, attraction and role in their catchment areas.
- 8.63 Nevertheless, it is clear from the company average sales densities for a selection of non-food retailers that average turnover levels could be significantly above or below this assumed average. For example, retailers in the DIY, carpet/floor coverings and furniture sectors generally achieve lower average sales levels of between £1,500 per sqm and £4,000 per sqm, whereas electrical goods retailers such as PC World and Comet are achieving average sales of up to £7,000 per sqm and above. These differences in sales levels will have implications for the assessment of the need for and impact of individual retailers. It will also be a key consideration for the local planning authority in assessing and determining applications for large format retailing (such as retail warehouses).
- 8.64 The table below sets out the headline capacity forecasts for the District and rest of the Study Area.

Table 8.4 Forest Heath District: Comparison goods capacity

	2016	2021	2026	2031
Residual expenditure (£m):	£1.1	£22.0	£47.7	£79.3
Floorspace capacity (sqm net):	188	3,487	7,017	10,830

Source: Table 17, Appendix 8 – Step 7.

- 8.65 The table shows that, after taking into account existing commitments, there will be limited capacity in 2016, but it is forecast to increase to 3,487 sqm (net) by 2021 and 10,830 sqm (net) by 2031.
- 8.66 Tables 18-22 (Appendix 8) break down this residual capacity by the main centres in accordance with their current market shares for comparison goods spending. As a result of its size, current offer and position within the retail hierarchy, we estimate that Newmarket Town Centre has capacity to accommodate 8,854 sqm of comparison goods floorspace by 2031. We consider potential opportunity sites to accommodate this level of provision in Appendix 11. We estimate that Brandon and Mildenhall Town Centres could accommodate 915 sqm and 971 sqm (net) of comparison goods floorspace respectively by 2031.

SUMMARY

- 8.67 This section has set out the strategic capacity forecasts for new convenience and comparison goods retail floorspace in the District and its main centres up to 2031.
- 8.68 The baseline capacity assessment has identified that at the strategic District-wide level, the potential capacity for new **convenience goods** floorspace after taking into account new commitments in 2016 is between 2,002 – 4,004 sqm net. The capacity increases to between 3,696 – 7,392 sqm (net) by 2026 and 4,555 – 9,109 sqm net by 2031.
- 8.69 We consider that there is both a quantitative and qualitative need to provide a foodstore anchor for Newmarket town centre to help claw back shoppers and expenditure currently flowing to the larger out-of-centre superstores. A store located in or immediately adjacent to the town centre with good pedestrian connections would, in our judgement, help to maximise the benefits to overall vitality and viability through linked trips and spin off expenditure.
- 8.70 In terms of **comparison goods**, there is forecast capacity for new floorspace in the District up to 2031 after taking into account all recent planning permissions and outstanding commitments. The analysis shows that there is capacity for 188 sqm (net) floorspace in 2016, growing to 7,017 sqm in 2026 and 10,830 sqm in 2031. Furthermore, this assessment is based on existing market shares which show a significant leakage of 65% of comparison goods expenditure from outside of the CCA.

A case could be made for Newmarket to increase its market share and capacity for new comparison goods floorspace if new development in the town centre was able to claw back non-food trade which is currently going out of the District to the competing centres such as Bury St. Edmunds, Cambridge and Haverhill. Clearly any proposal for significant new floorspace over and above that identified by the retail capacity assessment would need to be in compliance with national and local plan policies and meet the criteria set out in the NPPF with regard to the sequential and impact assessments.

- 8.71 The economic capacity analysis confirms the findings of the qualitative assessment, namely that there is a need for Forest Heath to provide new quality comparison goods floorspace over the development plan period to help maintain and enhance its position in the retail hierarchy

9.0 COMMERCIAL LEISURE – NEED ASSESSMENT

- 9.1 Leisure uses help to maintain and strengthen the vitality and viability of centres by providing complementary uses that contribute to both the daytime and evening economies, and can represent a significant proportion of overall town centre turnover^{*****}.
- 9.2 The main uses to which the town centre policies in the NPPF and PPS4 *Good Practice Guidance* apply are leisure, entertainment facilities, and the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls). They also apply to arts, culture and tourism uses (including theatres, museums, galleries and concert halls, hotels, and conference facilities).
- 9.3 The leisure sector is highly complex and dynamic. As a result, forecasting the growth of this sector and the potential need for new facilities and uses is more complicated than for retailing as the commercial leisure sector is particularly sensitive to changes in lifestyle and fashion trends, demographic changes and socio-economic variables. Unlike retailing, the approaches designed to forecast the need for new commercial leisure floorspace and uses are also less developed.
- 9.4 The PPS4 *Good Practice Guidance* recommends that assessments of the need for new leisure uses and floorspace should take account of both quantitative and qualitative considerations (Policy EC1.4). In this context, and drawing on the advice set out in the *Practice Guidance*, our analysis therefore focuses on the following key elements:
- a review of the key trends driving market demand in the leisure sector over the last 15 – 20 years (see **Appendix 10**);
 - an audit of the current provision in the District (both town and out-of-centre);
 - a broad assessment of the market demand from leisure operators for representation in the District and its main centres;
 - benchmarking current participation levels in existing leisure activities in the District based on published research against national averages to help determine whether there is potential for increased provision in certain sectors;
 - a review of the results of the household survey to understand current commercial leisure usage and preferences across the District and wider study area; and
 - a broad economic assessment of the need for new additional leisure facilities in the District and its main centres.

***** Recent research by the ATCM and BCSC entitled 'Better Town Centres at Night' (2010) has put the average value of the leisure and entertainment sectors at over one-quarter of town centre turnover

- 9.5 For the purpose of our assessment we have focussed on commercial leisure uses only (e.g. bars, restaurants, cinemas, healthclubs, etc.), although we have also reviewed the scale and type of public facilities in the District and its main centres (e.g. museums, galleries, public swimming baths, etc.).

DRIVERS OF GROWTH

- 9.6 The leisure industry has been one of the fastest growing sectors of the UK property market over the last 20 years. The sector's dynamic growth has been driven by changes in consumer lifestyles (such as eating out, going to the cinema and keeping fit), rising affluence and increased spending on leisure. This, in turn, has generated increased demand for new leisure and entertainment facilities.
- 9.7 Developers and investors responded to consumer demand by opening new and more sophisticated leisure formats. A good example of this is the growth of managed leisure centres and parks (such as Festival Leisure Park in Basildon). These parks are usually anchored by large multiplex cinemas and comprise a mix of other leisure uses (such as bowling alleys, health & fitness clubs, nightclubs, restaurants and bars). Despite the tighter planning policy controls on out-of-centre development, leisure parks are now generally viewed by the property industry as a less risky long-term investment, as they can generate significant visitor numbers from wide catchment areas.
- 9.8 Another key trend since the 1990s has been the growth of the evening and night-time economies in town centres, which in certain cases are vital ingredients to their overall appeal and have helped to fuel the revitalisation of once failing centres. Recent research⁺⁺⁺⁺⁺ estimates that some 7 million people in the UK are now economically active between 6pm and 9pm. Furthermore, according to Government statistics over one million people were employed in hotels, pubs, bars, nightclubs and restaurants in the UK in 2006, which compared with some 2.8 million in retailing.
- 9.9 However, as for the retail sector, after several years of strong growth over the last decade or more, analysts forecasts that it will be a much tougher period for the tourism, hospitality and leisure industry in the UK over the short to medium term. The combination of the credit crunch, falling house prices, rising unemployment, rising costs of living and the prolonged economic downturn has significantly reduced discretionary household spend. Any further growth in the leisure sector as a whole will therefore depend on a return to a more stable economic climate and an increase in consumer confidence.
- 9.10 At the same time, joint research by the BCSC/ATCM has identified that the 'alcohol bubble' that drove the fast-paced expansion of the 1990s has subsided. A number of

⁺⁺⁺⁺⁺ Planning the Night-time City (Marion Roberts & Adam Eldridge).

operators have gone out of business and others could desert the high street, due to the high costs and low volumes. There have also been shifts in consumer lifestyles over recent years, with more people preferring to 'drink at home' or socialise closer to home, in preference to town centre pubs and restaurants. Furthermore, more people are taking their entertainment at home (including watching movies on satellite/ cable TV and or playing computer games). In response many hard-pressed town centre pubs and bars have discounted their prices and are trading down-market in an attempt to stay in business. As a result, the night-time economy in many cities and towns has acquired a negative perception. This is particularly associated with the growing youth-orientated and alcohol-driven culture. In some cases town centres have become places to avoid after the shops and offices close.

- 9.11 A major driver of future demand, trends and new formats in leisure (and retail) will also be the ageing of the population. This will have a significant impact on the demand for different leisure products and services over the long term. In broad terms analysts predict that these 'time-rich' older consumers ('silver shoppers') will be more active than previous generations and will expect a wider choice of quality leisure products and services to meet their needs.
- 9.12 There are, therefore, significant challenges facing the planning and management of town centre early evening and night-time economies.

GROWTH IN EXPENDITURE

- 9.13 Table 9.1 below shows the UK average expenditure per head on leisure services and the average for the defined catchment zones based on the Experian 'Retail Planner' Reports. It shows that UK household spending on leisure services is dominated by the restaurant and cafe category (including pubs), which accounts for circa 60% of total leisure spend. This pattern is broadly repeated across all the zones.

Table 9.1 Estimates of Spending on Leisure Services in 2011 (£ per head)

Leisure Service	Zone1	Zone 2	Zone 3	CCA average	UK
					£/head
Accommodation services	107	131	84	107	109
Cultural services	263	293	239	265	267
Games of Chance	100	114	109	108	142
Hairdressing & grooming	76	87	69	77	82
Recreation & Sporting Services	116	134	85	112	95
Restaurants, Cafes etc	892	1,013	817	908	1,063
o TOTAL	1,554	1,773	1,403	1,557	1,839

Source: Experian Business Strategies Retail Planner Catchment Profile for Study Area.

- 9.14 **Table 9.2** below sets out the recent projections by Experian Business Strategies as set out in the '*Retail Planner Briefing Note 9*' (September 2011). These indicate negative growth until 2010, dipping down again in 2011, growing to between 0.8% and 1.0% from 2013 to 2028^{*****}.

Table 9.2 Actual & Forecast Growth in UK Leisure Spend (% per annum)

2005	'06	'07	'08	'09	'10	'11	'12	'13	2014-18	2019-28
-1.0	-1.0	-0.4	-3.0	-5.3	0.6	-1.5	0.3	1.0	0.8	1.0

Source: Experian Business Strategies, Retail Planner Briefing Note 9 (September 2011).

- 9.15 In our opinion, this forecast is more realistic than growth rates previously based on historic trends, as the economy is in an unprecedented downturn. This will impact on the discretionary spending by consumers over the short to medium term. Although this is the most up-to-date forecast available, we nevertheless acknowledge that growth could be lower or higher than this.
- 9.16 To estimate the level of leisure expenditure in the study area over the period to 2031, we draw on the EBS '*Retail Planner*' leisure expenditure data. The derived expenditure per person on leisure and recreation goods and services (in 2010 prices) is projected forward over the forecast period to 2031 by applying the forecast annual growth rates set out in Table 9.2. The resultant output is applied to the projected population profile for the study area, which produces the total available expenditure on leisure and recreation goods and services.
- 9.17 As Table 9.3 shows, between 2011 and 2016 total available leisure expenditure in the '*Core Catchment Area*' (CCA) is forecast to increase by 10% (£15.4m) to £167.5m. By 2031 total expenditure is forecast to increase to £223.6m, which represents a growth of 47% (£71.5m) between 2011 and 2031.

^{*****} Based on forecasts over the period 2011-2028. Source: Experian Business Strategies, Retail Planner Briefing Note 9 (September 2011).

Table 9.3 Total Available Leisure Expenditure: 2010 – 2026 (£m)

Location	2011	2016	2021	2026	2031	Change: 2011 - 2031
CCA	£152.1	£167.5	£184.9	£203.5	£223.6	47.0%
SCA	£61.3	£68.4	£76.6	£85.1	£93.7	52.9%
OCA	£268.1	£292.8	£322.2	£354.3	£386.3	44.0%

Notes: All monetary figures are expressed in 2010 prices

- 9.18 In compliance with national, regional and local policy we advise that this forecast growth should be directed towards enhancing provision of the District's centres to help maintain their overall vitality and viability, and mix of uses and attractions.
- 9.19 Based on the broad expenditure profile on leisure (Table 9.1), the majority of this growth is likely to be weighted towards restaurant and cafe spend. This highlights the potential to improve the scale and quality of Class A3 uses in the District's main centres.
- 9.20 In the context of this forecast growth, the following commentary briefly describes the need for new leisure uses and facilities within the main sub-sectors of the commercial leisure market. It also provides an update of the current reported demand for commercial leisure facilities in the District and its main centres, specifically focussing on Newmarket (see **Appendix 10** for a more detailed commentary on the key trends driving change and growth in the main leisure sectors).

CINEMAS

- 9.21 Newmarket used to have three cinemas, but currently films are only shown monthly in The Stable by a group of volunteers. The results of the household survey show that the majority of people in the study area who visit the cinema currently go to:
- the 8-screen Cineworld in Bury St Edmunds^{§§§§§§§§} - which is achieving a market share of 60% in the CCA and 52% across the study area as a whole;
 - the 9-screen Cineworld in Cambridge - which is achieving a market share of 12.5% in the CCA and 10% across the study area as a whole;
 - the 2-screen Abbeygate Picture House (formerly known as the Hollywood Screen, or Odeon), Bury St Edmunds - which is achieving a market share of circa 11% in the CCA and 8% across the study area as a whole; or

^{§§§§§§§§} Please note that this figure may be higher, as 6.5% of respondents within the CCA identified "Bury St. Edmunds" as the place where they normally go to the cinema without identifying a specific operator. Another 6.5% of respondents identified the "Odeon Cinema"

- the 8-screen Vue Cinema in Cambridge - which is achieving a market share of cinema trips of 3.2% in the CCA or 3.4% across the study area.
- 9.22 Other cinemas that are visited by residents of the CCA include the 3-screen Arts Picture House in Cambridge (0.7%); the 5-screen cinema in Haverhill (2.0%); and the one-screen Maltings cinema in Ely (0.7% of the CCA).
- 9.23 It is not possible to benchmark these figures against the results of the 2006 RTCS as the HTIS did not ask where respondents normally go to the Cinema.
- 9.24 The household survey and health check for Newmarket has identified a qualitative need for a cinema in the District and town centre. Furthermore, in response to the questionnaire that helped to inform the Town Council's *Vision for Newmarket* the need for a cinema was the most popular recreational/ leisure facility identified by some 36% of respondents. This was significantly higher than the identified need for a Youth Club (19%), Bowling Alley (14%) and Ice/ Roller Skating Rink (13%).
- 9.25 The desire for a cinema is repeated in the results of the 2011 HTIS, which shows that 17% of respondents within the CCA identified a 'cinema' as something that would make them visit Newmarket town centre more often than they currently do.
- 9.26 There is therefore a clear and present need for a modern multi-screen cinema in Newmarket to meet the requirements of the District's population. A cinema in the town centre would also help to anchor the town centre's commercial leisure offer and create a more diverse and attractive early evening and night time economy.
- 9.27 In terms of the most appropriate scale and form of cinema that could reasonably be accommodated in the District and specifically in Newmarket town centre, we have carried out a high level assessment of the need for new cinema screens and seats up to 2031, updating the results of the 2006 RTCS.
- 9.28 Data from Dodona, (a specialist consultancy in the cinema industry) suggests that the average screen density for cinema provision in the East of England is 5.1 screens per 100,000 people. Table 9.4 below considers the notional requirement for additional cinema screens in the District based on population projections. Please note that population projections do not take into account residents of the District's RAF bases as we anticipate they will normally use facilities on base.

Table 9.4 Potential Capacity for New Cinema Screens in the District

Location	2011	2016	2021	2026	2031
CCA Population	96,389	102,282	107,883	112,974	118,131
Existing Screens	0	0	0	0	0
Capacity for New Screens	5	5	5	6	6

Source: Strategic Perspectives LLP / Dodona Research.

- 9.29 The CCA has a population of 96,389 in 2011. Applying this to the average population density for cinema provision suggests a notional requirement for roughly 5 cinema screens. This grows to circa 6 screens by 2031.
- 9.30 We consider there is a qualitative and quantitative need for a multiplex cinema in the District. We advise the Council that any new cinema should preferably be located in Newmarket town centre, as it is the District's higher order centre. In this context, however, we are aware that the recent planning application for a mixed use scheme on the George Lambton Playing Fields is seeking permission for a 7-screen multiplex cinema, along with a Sainsbury's superstore, two restaurants (Class A3) and a drive-thru restaurant (Class A5).

EATING AND DRINKING OUT

- 9.31 As described above, UK household spending on leisure services is dominated by the restaurant and cafe sector. Some of the key trends influencing the growth of Class A3 (restaurants and cafes), Class A4 (drinking establishments) and Class A5 (takeaways) uses over recent years are described in more detail in **Appendix 10**. These national trends provide important context for the assessment of current provision in the District and its main centres.
- 9.32 Based on the most recent audit of the main town centres, the current provision of Class A3-A5 uses is as follows:

Table 9.5 Current Provision of Class A3-A5 Uses

Location	Class A3	Class A4	Class A5	TOTAL
Newmarket Town Centre	25.5*	8	7	40.5
Brandon Town Centre	6.5	3	6.5	16
Mildenhall Town Centre	13	2	5	20
Lakenheath Local Centre	3	3	3	9

Source: FHDC / Strategic Perspectives LLP

Notes: *This includes 3 Class A3 units that were vacant at the time of the 2011 audit.

- 9.33 The main cafe, restaurant and takeaway operators in each centre include:

Table 9.6 Current Provision of Class A3-A5 Uses

Centre	Cafe	Restaurant	Takeaway
Newmarket	Tic Toc Cafe / Costa Coffee / Quattro Coffee Shop / Coffee & Co /	Prezzo / Pizza Express / Sangdao Thai Restaurant / Turkuaz Restaurant / Curry Inn / Montaz Indian Cuisine / Central Fish Bar.	KFC / Greggs / Ocean City Chinese Takeaway / Dominos Pizza / Newmarket Kebab House
Brandon	Centre Cafe / The Coffee Shop / Bambina's Cafe	Collins Restaurant / Brandon Tandoori / Fish Bar /	Ali's Kebabs / Collins Fish & Chips / Pagoda / Kings Garden Takeaway
Mildenhall	Emily's Tea Room / St Andrew's Cafe / Webbs / Café above the health shop	Istanbul Restaurant / Gandhi Indian Cuisine / Dragon House Chinese / Snushalls Wet Fish / Thai / Wongs	Rumbles Fish Bar / Dominos Pizza / KFC / Little Italy Takeaway / Pizza Shanghai
Lakenheath	CJ's Sandwich Bar	Filipianana Restaurant / Green Box Sushi	Rising Star / Charlie's Kebab House / Tunfills Fish & Chips

Source: FHDC / Strategic Perspectives LLP

9.34 The tables show that the main provision is concentrated in Newmarket Town Centre. This is to be expected given its principal role as the main shopping and leisure destination in the District's hierarchy and network of centres, as well as being a significant visitor destination for horse racing. Notwithstanding this, we consider that the overall scale, quality and choice of Newmarket's cafe and restaurant offer appears to be limited. As Table 9.6 shows, there are only a handful of national brands trading in the town centre at the current time (such as Costa Coffee, Prezzo and Pizza Express). This is surprising given the wider draw and attraction of the town centre.

9.35 The results of the household survey help to identify where people living in the study area currently go to eat and drink. The key results are summarised below:

- circa 8% of respondents within the CCA frequent restaurants at least once a week, 14% once every two weeks, 31% once a month, 17% once every two months and 5% once every six months, with 21% indicating they never visit restaurants;
- Of those residents in the CCA that do visit restaurants, around half (48%) visit places within the District, including Newmarket (33%), Mildenhall (9%) and Brandon (1%). Of those that normally go to restaurants outside of the District, this is mostly in Bury St Edmunds (27%) and Cambridge (10%);
- the majority of respondents in the CCA (51%) do not visit pubs and/or bars. Of those that do, they vary relatively evenly between visiting once a month and once a week;
- Of those that do visit pubs/bars, most (46%) visit venues in Newmarket and 12% visit other venues within the District. Of those who travel outside of the District,

the most popular destinations are Bury St Edmunds (16%), Cambridge (7%) and Thetford (6%).

- 9.36 The Co-star *Retail Focus* dataset indicates that there is only demand from one A3/A4/A5 operator for representation in Newmarket town centre, namely Frankie & Benny's (between 345 - 465 sqm). This is potentially a reflection of the current economic climate, as limited discretionary spending by households is resulting in cautious rates of expansion by operators.
- 9.37 In order to assess the potential capacity for new eating and drinking establishments we have tested the assumption that an additional 15% - 30% of the forecast capacity for comparison goods floorspace (as determined in Section 8.0) would normally support a mix of new cafés, restaurants, pubs and wine bars. This assumption is backed up by research that identified the importance of a mix of uses at ground floor level (not just retail) as an important component of new sustainable development and as a significant contributor to the overall vitality and viability of centres. The research specifically identified that the hospitality industry, in its widest sense, *"...forms an important and sizeable proportion of premises averaging 24% of ground floor stock"*^{*****}. Furthermore Experian GOAD's centre reports show that on average cafe's, restaurants, bars, pubs and takeaways account for up to 11% of floorspace and 16% of outlets in the 2,500 shopping areas that they cover.
- 9.38 On the basis of the comparison forecasts determined in Section 8.0 we consider that there is potential capacity for between 1,624 sqm and 3,249 sqm of Class A3/A4/A5 floorspace in the District by 2031.

Table 9.7 Commercial Leisure Floorspace Capacity (A3 / A4 / A5 uses only) (sqm)

sqm net	2016	2021	2026	2031
CCA Only:	28 - 56	523 - 1,046	1,053 - 2,105	1,624 - 3,249
Newmarket	23 - 46	428 - 855	860 - 1,721	1,328 - 2,656
Brandon	2 - 5	44 - 88	89 - 178	137 - 274
Mildenhall	3 - 5	47 - 94	94 - 189	146 - 291

Notes: Derived from baseline comparison goods capacity assessment. Please note there is no capacity for comparison goods floorspace in 2016 after taking into account commitments. Numbers may not sum due to rounding.

***** The Streetscape of major UK cities', Savills, Winter 2004, pg.3

- 9.39 It should be noted that the forecast capacity for Class A3-A5 floorspace provides only a broad indication of the theoretical potential for new floorspace to complement the retail capacity forecasts.

NIGHTCLUBS

- 9.40 Newmarket town centre is a popular night-time destination and its provision is largely dominated by nightclubs. Indeed Newmarket is generally referred to as the "*clubbing centre*" of East Anglia and clubs are mainly clustered in the south western end of the High Street (De Niro's Nightclub, Millionaire's Bar, Pacino's Bar, The Bull, Innocence).
- 9.41 Our analysis of the household survey results indicates the following key trends:
- the majority of respondents in the CCA (78%) never visit nightclubs. Of those that do, 3% visit once a fortnight, 4% once a month, 5% once every two months, 5% once every six months and 4% once a year or more;
 - of those that do visit nightclubs, the majority (44%) visit venues within the District;
 - Other competing centres with substantial market shares include Cambridge (23%), Bury St Edmunds (11%) and Central London (11%).
- 9.42 The results of the HTIS demonstrate that nightclubs are not frequented by the majority of respondents in the CCA, or indeed in the study area as a whole. This, therefore, suggests that the District's nightclubs may cater mostly to tourists from outside of the study area.
- 9.43 Although the nightclubbing industry provides an important contribution to the town's economy, it also has its downsides, including anti-social activity and disturbances to other residents. According to a survey of 514 residents undertaken in July 2010 by the Town Council as part of their *Vision for Newmarket*, 56% of respondents thought that Newmarket's reputation as a "night-life centre" deterred those wishing to visit the centre in the evenings. Of the remainder, some 20% thought that Newmarket was no different to other towns in terms of its provision; and only 12% thought that it attracted in visitors. Outside of the younger population, the industry is seen to offer relatively little to other residents.
- 9.44 The nightclub trade appears to contribute to expenditure inflow to the District. However, the benefit of these types of uses to Newmarket town centre as a whole will be dependent upon the amount and extent of positive linkages this type of trade makes with other town centre businesses (hotel, restaurant, etc) and the extent to which any negative externalities arising from nightclub uses are minimised.
- 9.45 The level of retention indicates a stronger and varied offer in the District and Newmarket in particular. We consider that the level of leakage to competing centres is

reasonable bearing in mind their proximity and existing nightclub offer. This suggests that the overall provision is meeting the needs of the main users within the CCA.

- 9.46 Based on our review of market demand, we also understand that there is currently no identified requirement for any other nightclub operator seeking space in Newmarket town centre, or other centres in the District.

HEALTH & FITNESS

- 9.47 As described in **Appendix 10**, the health and fitness sector has been through a series of peaks and troughs since the sector first gained popularity in the mid-1990s.
- 9.48 The rapid growth of privately-owned clubs in certain areas has created increased competition for members and market share, which has resulted in the weaker (poor quality) clubs losing out. With increased competition, there has been a rise in attrition rates. Nevertheless, there still remains strong demand for an affordable health and fitness product, such as provided by LA Fitness and Fitness First, and a new breed of 24-hour budget gyms. Health and fitness operators are also now increasingly targeting town centre sites and mixed-use development schemes. This is helping to create a wider range of attractions and activity in town centres, particularly in the evenings and at weekends. More flexible planning policies will therefore need to be introduced which help to encourage an element of such uses within or on the edge-of-town centres.
- 9.49 Our market demand assessment has indicated there are currently no published additional requirements for health and fitness operators in the study area.
- 9.50 Table 9.8 shows the current representation of national, regional and independent privately-owned health and fitness operators across the District, as well as the Council-owned leisure centres.

Table 9.8 Leisure Centres, Fitness Clubs & Gyms in Forest Heath District

Facility	Address	Private Sector	Public Sector	Voluntary Sector
NEWMARKET:				
Newmarket Leisure Centre	Exning Rad		✓	
Bedford Lodge Hotel	Bury Road	✓		
Perfect U	Vicotria Way	✓		
MILDENHALL:				
Mildenhall (Dome) Leisure Centre	Bury Road		✓	
BRANDON:				
Brandon Leisure Centre	Church Road		✓	
LAKENHEATH:				
N/A				

- 9.51 The table shows that most of the District's leisure centres are owned by the Council. There are some notable gaps in representation; for example, David Lloyd, Fitness First, Esporta, Virgin Active, Livingwell, Greens Health, Bannatyne and Energie are not represented in the District and its main centres. This notwithstanding our market demand assessment has not identified interest from commercial operators for representation in the town centre or wider area.
- 9.52 Analysis of the household survey shows that approximately 60% of residents within the CCA do not go to the gym or healthclub. Of those that do, most go at least once a week (29%) if not more. Of those that do visit a gym or health club, 80% visit facilities within the District. Of those respondents who identified an operator by name, the most popular were:
- Newmarket Leisure Centre in Newmarket (25% of respondents);
 - Dome Leisure Centre in Mildenhall (9%);
 - Bedford Lodge Hotel in Newmarket (3%);
 - Brandon Leisure Centre in Brandon (3%)
- 9.53 Of the 20% of gym/healthclub visits from respondents within the CCA which "leak" outside of the District, these are mainly to Thetford (8%) or Bury St Edmunds (8%) and may be linked with other activities (such as work).
- 9.54 To obtain a further understanding of participation rates in health and fitness within the District we have drawn on the CACI Participation Profile report (**Appendix 10**), which shows the average participation rate for all health and fitness categories is 45%. The 2011 HTIS show that at circa 40%, participation rates are slightly below average. This

may indicate a shortfall in the current provision of health and fitness centres in the District.

CASINOS AND GAMBLING

- 9.55 As described in **Appendix 10**, gambling represents a significant and growing element of the leisure industry. The main sectors of the gambling industry comprise Casinos, Bingo Halls, betting shops and, most recently, on-line gambling.
- 9.56 Based on the available evidence, the following provides an overview of the current provision and popularity of the gaming/gambling sector in the District and its main centres, as well as the need for additional uses.
- 9.57 In terms of **Casinos** provision in the District is limited to Casino Slots in Newmarket. The household survey results show that no respondents that live in the CCA visit Casinos.
- 9.58 As described in **Section 6.0**, the major **horse racing courses and stables** are clearly a fundamental part of Newmarket's overall offer and attraction. The horse racing industry that has developed around this makes a significant contribution to the local economy. In the UK horse racing is second only to football as the most televised sport and accounts for some 70% of the turnover of betting shops. Betting on newmarket horseracing in 2004/05 was over £10bn which was as bet off-course mostly in the 8,500 licensed betting offices in Britain, with a further £120m bet with the Tote on-course⁺⁺⁺⁺⁺⁺.
- 9.59 **Bingo** operators are facing challenging conditions, with the consumer slowdown likely to exacerbate the continued impact of the smoking ban, the loss of lucrative gaming machines and growing competitive pressure from other forms of gambling. The only two commercial Bingo clubs in the District were located in Brandon, however these have now both closed.
- 9.60 According to the results of the 2011 HTIS, approximately 7% of respondents within the CCA partake in Bingo. Of these, 61% visit facilities outside of the District, mainly the Winner's Bingo in Thetford (33%) and Bury St Edmunds (15%). This is higher than the GB Average of circa 2.5%. We consider that the relatively high leakage of Bingo activities to competing centres could be due to a lack of facilities within the District. the provision of Bingo facilities within Newmarket Town Centre could help fill this gap in provision and serve to enhance the night-time offer of the town centre.

++++++ The British Horseracing Authority (2009)

TEN-PIN BOWLING

- 9.61 As described in **Appendix 10**, this sector of the leisure industry has developed and growth is largely polarised between the major national operators, usually seeking to co-locate with other leisure uses in leisure parks or entertainment venues, and the smaller niche operators.
- 9.62 Based on the available evidence, we have identified that the only public^{*****} ten-pin bowling venue in the District is Mr. G's Bowling Centre in Brandon.
- 9.63 The household survey indicates that 24% of residents within the CCA go ten-pin bowling, which is substantially higher than the 2.5% GB average participation rate. However, of those that do bowl, only 20% do so in the District. The majority of respondents visit facilities outside of the District, the most popular of which are Bury Bowl in Bury St Edmunds (31%) and Strikes Bowling Centre in Ely (27%).
- 9.64 In the light of the limited provision in the District itself and the relatively high leakage of ten-pin bowling trips outside the District, we consider that there is a qualitative need for a facility in Newmarket town centre in the future to complement other commercial leisure activities and to help underpin more diverse and viable evening economies.

CULTURAL ACTIVITIES

- 9.65 The results of the 2011 HTIS show that 63% of CCA respondents never visit museums or places of historical interest and 61% never go to the theatre.
- 9.66 A review of the household survey shows that of those who went to a museum or place of historical interest from the study area, almost half (48%) went to Central London and 20% went to Cambridge. Notwithstanding the provision of places of historical interest in the District (such as the National Horseracing Museum in Newmarket and the Mildenhall Museum), only circa 8% of respondents from the CCA identified these as places of historical interest they visit.
- 9.67 Theatres are also an important cultural component. Theatre provision within the District is limited to the Kings Theatre in Newmarket. This is reflected in the results of the 2011 HTIS which shows that of respondents in the CCA who normally go to the theatre (circa 40%), 6% visit facilities in the District.
- 9.68 The most popular destinations for theatre viewing are:
- London (42%)

^{*****} Please note that ten-pin bowling facilities on the RAF bases are not considered as part of this leisure capacity assessment as they are not available for use by local residents.

- Theatre Royal, Bury St Edmunds (14%);
- Theatre Royal, Norwich (10%); and
- Cambridge Arts Theatre, Cambridge (9%).

9.69 Notwithstanding this, we consider there is limited capacity for a second theatre within Newmarket town centre, and the populations of the other centres in the District are too small to support a new theatre facility.

SUMMARY

9.70 As for the retail sector, the leisure industry faces considerable challenges and pressures. In the current uncertain economic climate, it is clear that consumers are becoming increasingly selective in terms of where and how they spend their discretionary leisure spending. For example, more households are choosing to eat at home rather than eat out to save money. There will also be a continued increase in at-home activities due to the advances in computers, television and audio technology (such as 3-D for example).

9.71 The immediate challenge for operators during this period of recession is therefore to attract consumers away from their homes. The relatively strong trading performance of operators such as Dominos Pizza shows that consumers are choosing to entertain at home. Thus, value for money offers will clearly outperform during the current downturn.

9.72 Our broad review of the commercial leisure sector in the District indicates that beyond the horseracing industry, leisure uses in Newmarket and the other main centres are limited to public houses, nightclub/bars, and restaurants.

9.73 Our qualitative and quantitative need assessment has confirmed that over the short, medium and longer term there is potential for:

- A higher quality and choice of cafes and restaurants in the District and specifically Newmarket town centre; with potential capacity across the District for between 28 sqm and 56 sqm net of Class A3-A5 floorspace by 2016, increasing to between 1,624 sqm and 3,249 sqm net by 2031.
- A new multiplex cinema in Newmarket town centre, with the potential capacity for between 5 and 6 screens.
- A new Bingo hall and ten-pin bowling facility to aid vitality and contribute to a diverse evening economy of Newmarket town centre.

9.74 Finally, cultural activities provide a crucial link with tourism and should therefore be maintained and enhanced to ensure that this offer remains attractive. The marketing of these attractions to a wider audience should be reinforced.

10.0 KEY FINDINGS & RECOMMENDATIONS

- 10.1 This study provides a strategic assessment of the quantitative and qualitative need for new retail floorspace and commercial leisure uses in Forest Heath District. It provides a sound framework based on robust baseline evidence to guide the District's shopping and leisure needs up to 2016, 2021, 2026 and 2031.
- 10.2 Newmarket is the principal shopping and leisure destination in the District and therefore the main focus of this assessment. However, we also provide advice on the future potential and performance of other smaller centres in the District (namely Brandon, Mildenhall, Lakenheath and Red Lodge) as they all perform important roles in the retail hierarchy.
- 10.3 The principal findings and recommendations of the analysis are set out in this concluding section.

THE CONTEXT FOR GROWTH

- 10.4 The retail and urban landscape has changed dramatically over the last two decades. Increased car ownership has resulted in greater household mobility and therefore the choices of shopping locations and the distances that can be travelled are much greater. The so-called waves of retail decentralisation have resulted in substantial new comparison and convenience goods retail floorspace being developed in out-of-centre locations. Additionally, over the last 5 years, the growth of Internet shopping has taken an increasing market share of retail sales.
- 10.5 The state of the economy continues to underpin and impact the dynamism of the retail sector. The boom enjoyed by the UK over the last decade is over and the prevailing economy is in a fragile state. This presents significant additional challenges for the sector and retail led investments in particular. Depressed levels of consumer and business confidence, rising unemployment, contracting disposable incomes and a bleak international backdrop suggest negative or flat growth over the short term and a slow upturn over the medium term. This too has implications for future expenditure growth and capacity over the forecast period.
- 10.6 At a spatial level, there has been a long-term polarisation of new retail development and investment in the country's top 50 to 100 larger centres. This trend is likely to be further exacerbated by the economic downturn. In certain cases this has weakened the vitality and viability of those smaller and medium-sized centres that are also competing with out-of-centre shopping locations. At the same time, national multiple retailers and leisure operators have become increasingly space hungry as they seek larger store formats and buildings to accommodate a wider product offer.
- 10.7 In turn, this is placing increased pressure on LPAs to identify and allocate larger sites in town centres for comprehensive retail and mixed use developments. However,

some of these opportunity sites may be more 'aspirational' than realistic. This is because commercial values in small centres are sometimes too low to make new development viable and land assembly can be highly problematic. A further obstacle could be the cost of creating good linkages or breaching barriers to pedestrian movement, to enable a site to function as edge-of-centre. It is the role of the Local Authority to guide and promote the direction of where new development occurs.

- 10.8 These trends present significant opportunities and challenges to Forest Heath District and its main centres, principally Newmarket.

FOREST HEATH DISTRICT – RETAIL CAPACITY

- 10.9 The baseline capacity forecasts provide a strategic economic assessment of the potential for new convenience and comparison goods floorspace in the District up to 2031. The capacity forecasts are summarised in the table below.

Table 10.1 Forest Heath District: Retail Capacity

	2016	2021	2026	2031
CONVENIENCE GOODS:				
Residual expenditure (£m):	£23.5	£35.3	£46.0	£57.5
Floorspace capacity (sqm net):	1,941 – 3,882	2,880 – 5,760	3,696 – 7,392	4,555 – 9,109
COMPARISON GOODS:				
Residual expenditure (£m):	£1.1	£22.0	£47.7	£79.3
Floorspace capacity (sqm net):	188	3,487	7,017	10,830

Source: Table 15, Appendix 8 & Table 17, Appendix 9.

- 10.10 For **convenience goods** retailing, there is some forecast capacity over the short to medium term (up to 2021) for major new floorspace after taking into account all recent planning permissions and outstanding commitments. We estimate that Newmarket should accommodate around half of this forecast capacity (between 2,058 sqm and 4,115 sqm net).
- 10.11 For **comparison goods**, after taking into account commitments, there is minimal capacity for additional comparison goods floorspace in 2016. However, this grows to 7,017 sqm (net) by 2026 and 10,830 sqm (net) by 2031. The economic capacity analysis confirms that there is a need for Newmarket to provide new quality comparison goods floorspace over the development plan period to help maintain and enhance its position in the retail hierarchy.
- 10.12 The strategic District-wide floorspace capacity forecasts should be treated as a broad indication of the potential need for new retail floorspace, rather than a maximum or minimum threshold (or target) that should necessarily be met. Forecasts more than

five years ahead are inherently less certain and should therefore be treated with caution and regularly updated.

- 10.13 Furthermore, the capacity forecasts are based on constant market shares up to 2031. Although this is an accepted approach for retail studies, it inevitably does not take account of changing shopping patterns that can arise from new development. This will be one of a number of important considerations for the Council when assessing and determining future planning applications. For example, if an opportunity is identified for a large scheme in the town centre or a sequentially preferable edge-of-centre site, then this could increase the town centre's market share of expenditure from within the District and the wider catchment area. Any uplift in market shares arising from new development would, therefore, generate additional residual expenditure and forecast capacity for new floorspace over and above the forecasts identified by this study.

PRIMARY SHOPPING AREAS

- 10.14 The NPPF defines primary shopping areas as the *"defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage"* (Appendix 2).
- 10.15 It is critical that any new development is effectively integrated into the established core, and planned in such a way as to reinforce the centre as a whole. It is important that the Local Plan allocates Primary Shopping Areas (PSA) for the three main towns in order to consolidate retail activity and define the area within the town centre which should be used to inform whether a site is considered edge or out of centre as part of the sequential assessment.
- 10.16 The emerging Development Management DPD proposes Primary Shopping Areas for Newmarket, Brandon and Mildenhall. We support the proposed allocation of the major anchor town centre foodstores within the PSA in Newmarket (Waitrose), Brandon (Aldi) and Mildenhall (Sainsbury's) due to the important role they play in retaining local convenience expenditure and contributing to linked trips to their respective town centres.

NEWMARKET TOWN CENTRE

- 10.17 The economic performance of Newmarket town centre is important to the continued growth and prosperity of the District as a whole. As the principal centre in the District for retail, leisure and service uses, it has a clear role to play in driving the development of the District into the future.
- 10.18 The following sets out our key findings and recommendations with regard to its retail and leisure offer, carried out in compliance with the Council's Brief and the NPPF.

Retail Needs

- 10.19 Newmarket is defined as a Market Town in the East of England RSS. The Plan states that town centres within the East of England will continue to be the focus for investment, environmental enhancement and regeneration. The plan also acknowledges that centres such as Newmarket, should capitalise on the close proximity of the Cambridge area to diversify and strengthen their economies.
- 10.20 Within the adopted Core Strategy, **Vision 2** relates to Newmarket specifically and envisions that the town will remain the largest town in the District and its facilities and retail offerings will be developed and expanded in order to enhance its position as a “hub” from which its offers can be enjoyed by both residents, tourists and businesses.

Health Check

- 10.21 Although a large and relatively popular shopping destination, the health check has identified a degree of fragility in Newmarket’s overall vitality and viability. For example:
- the Guineas Shopping Centre is poorly integrated with the High Street and primary shopping area and has a number of vacancies;
 - there is limited (published) demand from retailers and leisure operators seeking representation in Newmarket and requirements have fallen considerably since 2006;
 - on average, unit sizes are small and poorly configured, and do not match the requirements of modern retailers for larger floor areas;
 - the town lacks a high quality department store anchor;
 - there is a quality ‘gap’ in its overall retail and fashion offer;
 - the outdoor market is under-performing;
 - it has not benefitted from significant new investment in its retail floorspace and offer for a number of years; and
 - the amount of vacant floorspace has increased in the town centre since 2006.
- 10.22 Significantly, Newmarket’s role and status as the principal shopping location for residents within the District and a wider catchment has been eroded over the past decade by significant new investment and development in larger centres outside the District. This includes Cambridge and Bury St Edmunds, as well as major out-of-centre schemes both within and outside the District. For example, the results of the 2011 HTIS indicate that 65% of comparison goods expenditure is ‘leaking’ from the core catchment area to competing centres and shopping facilities. Although this is less than the 69.5% leakage experienced in 2006, it is still significant.

Convenience Goods – Need Assessment

- 10.23 The town's convenience goods offer has declined by almost 30% since 2006 (from 17 to 12 outlets) and current provision is below the national average. The smaller independent stores in the town centre, along with the Marks & Spencer foodhall in the Guineas Shopping Centre and Iceland on Crown Walk, principally serve the day-to-day needs of shoppers and workers. The main bulk food shopping needs of residents using town centre facilities for this purpose is currently being met by the edge-of-centre Waitrose store. The retail assessment indicates that this centre is trading slightly above its 'benchmark' turnover levels. This store is well connected to the primary shopping area and provides significant benefits to other shops and facilities in the town centre through 'linked trips' and spin-off expenditure. The survey results confirm that 10% of trips to the Waitrose are linked to the town centre's other shops and business.
- 10.24 The Tesco at Fordham Road is the only major out-of-centre food superstore in Newmarket with a significant market share for convenience goods expenditure. In terms of its overall performance, the store is the dominant foodstore in Zone 2. It also acts as a significant draw for shoppers throughout the core catchment area and draws an element of trade from the secondary catchment area. The Tesco store is estimated to be achieving a 'potential' ('actual') turnover of £54.4m, which is 177% above its 'benchmark' level of £30.8m. Notwithstanding this, based on our audit of the store we do not consider that its operation suffers from the "symptoms of overtrading".
- 10.25 The capacity assessment has identified the following potential for new convenience goods floorspace in Newmarket up to 2021.

Table 10.2 Newmarket: Convenience Goods Retail Capacity

	2016	2021	2026	2031
o Residual expenditure (£m):	£10.6	£15.9	£20.8	£26.0
o Floorspace capacity (sqm net):	877 – 1,754	1,301 – 2,603	1,670 – 3,340	2,058 – 4,115

Source: Tables 9 & 20, Appendix 7

- 10.26 The capacity for new retail floorspace is based on constant market shares, the forecast growth in population and expenditure, and the performance of existing stores and convenience floorspace. The table shows that Newmarket has the potential to accommodate between 2,058 – 4,115 sqm (net) of new convenience goods floorspace in the centre up to 2031.
- 10.27 Notwithstanding this, there has been a 'wave' of recent applications for new superstore floorspace in out-of-centre locations. These are:
- A proposal by **Tesco Stores Limited** (hereafter referred to as Tesco) for a replacement store to increase the floorspace and non-food retail offer of the existing out-of-centre Tesco at Fordham Road (Reference: F/2011/0084/FUL).

- A joint proposal by **Sainsbury's Supermarkets Limited** (Sainsbury's) and the **Trustees of EG Lambton 1974 Settlement** for a new Sainsbury's foodstore, 3 non-food retail units, 7-screen cinema, 3 (Class A3) restaurants, housing, car parking and petrol filling station at the George Lambton Playing Fields (GLPF) site, also at Fordham Road opposite the Tesco site (Reference: F/2011/0541/HYB).
- A joint proposal on behalf of **Simons Developments Limited** (SDL), **Optimisation Developments Limited** (Morrisons) and **Birch Sites Limited** (National Grid) for the redevelopment of the former gas works site on Exning Road to provide a new Morrisons foodstore with associated car parking, access (including a new roundabout off Exning Road), servicing and landscaping (Reference: F/2011/0712/FUL).
- An application by the **Unex Group** in May 2012 for a retail, hotel, restaurant/bar and equestrian mixed use development, on land under their ownership at 196-198 and 218-222 High Street. The retail element of the proposal is for an Asda foodstore of circa 3,716 sqm (net) (Reference: F/2012/0216/FUL).

10.28 The Council will need to carefully consider these applications in accordance with national, regional and local planning policy. This will involve assessment of the potential for town centre and edge-of-centre sites to accommodate all or some of the forecast capacity in compliance with the sequential approach, as well as the likely cumulative impact of new development on the overall vitality and viability of the town centre.

Comparison Goods – Need Assessment

10.29 In terms of its comparison goods performance, the 2011 HTIS indicates that Newmarket is performing reasonably well at present. It has an estimated 'potential' turnover of £79.0m based on the results of the 2011 HTIS (compared with £58.2m) and an average sales density of £4,310 per sqm (compared with £4,264 per sqm net in 2006). As described above, we have assumed that existing comparison goods floorspace is currently trading around benchmark levels.

10.30 The table below shows that there is potential for 5,736 sqm (net) of new floorspace by 2026, increasing to 8,854 sqm (net) by 2031.

Table 10.3 Newmarket Town Centre: Comparison Goods Retail Capacity

	2016	2021	2026	2031
Residual expenditure (£m):	£0.9	£18.0	£39.0	£64.8
Floorspace capacity (sqm net):	154	2,851	5,736	8,854

Source: Table 16 Appendix 7 & Table 19 Appendix 8.

10.31 Both the qualitative and quantitative need assessments highlight the need to improve and consolidate comparison goods retail floorspace in Newmarket in line with its role

as a Town Centre. Improvements through refurbishment or redevelopment will help to consolidate the centre and maintain market share over the Local Plan period. Although we have not modelled it, we consider that there could be potential to further enhance the town centre's comparison goods offer through the 'claw-back' of shoppers and expenditure. However, this would require careful consideration to ensure the scale of development is appropriate to the centre's built form and its role in the retail hierarchy.

Primary Shopping Areas

- 10.32 The emerging Development Management Document proposes allocating a Primary Shopping Area in Newmarket. This area is focused at the north eastern end of the High Street and includes Waitrose. We consider that the extent of the proposed PSA is appropriate.
- 10.33 The Council should set an appropriate policy to guide the mix of uses and prevent the over-concentration of non-A1 uses in order to support the continued predominance of retail uses in the PSA.

Opportunity Sites

- 10.34 Working with the Council we have identified a number of potential opportunities to accommodate new retail, leisure and mixed use floorspace over the development plan period. These are reviewed in more detail in **Appendix 11** and the key findings are as follows:
- Directly adjacent to the Guineas, **Market Place Car Park/ Market Square** has extant permission for new retail floorspace. Implementation of this permission would increase retail provision within the town centre and create sufficient floorspace to allow Marks and Spencer to expand to provide a major anchor to the shopping centre.
 - The **TK Maxx** unit (former Waitrose) was occupied by TK Maxx in 2006 and this operator has circa 10 years remaining on their lease. The unit is owned freehold by FHDC and is located outside of the Conservation Area. As landowner of the site, the Council may have the ability to either bring it forward for redevelopment, or to promote an alternative use, subject to consideration of the likely significant impacts of such a change upon the terms of its long term lease and the wider impact upon Council finances and operations.
 - **Fitzroy Paddocks /Queensbury Lodge Stables** is located outside the proposed town centre boundary but within 300m of the PSA and is therefore defined as edge of centre for the purpose of this assessment. The fact that an application has been submitted with a named operator (ASDA) indicates that the site is available and is viable for the proposed development. However, there are clearly issues with regard to the suitability of the site due to its location in the Conservation Area,

Listed Building Status and Local Plan Policy preventing changes of use from racehorse training establishments. In our judgement, these can only be resolved by the local planning authority. However, there is clearly potential for the site to come forward for redevelopment.

- 10.35 In summary, our review of a number of key opportunity sites in and on the edge of Newmarket town centre indicates that some of these, whilst complex, could represent suitable and viable opportunities for new retail and commercial leisure uses, and could be available for redevelopment within a reasonable period of time.
- 10.36 It is important that the Council responds to safeguarding the vitality and viability of the centre over the long term by identifying and allocating new sites for retail and mixed use development, and promoting new investment in the centre by engaging with owners, developers and retailers. Any proposals for the centre over the development plan period should also promote public realm improvements and enhancement to the pedestrian environment.

Commercial Leisure Needs

- 10.37 The town's commercial leisure provision and its evening/night time economy is largely underpinned by its circa 25 restaurants, 8 public houses and 5 nightclubs. It is widely accepted that town centre evening and night-time economies are vital ingredients to the overall attraction and viability of centres^{§§§§§§§§}. However, it can be a fine balance between successful and failing evening economies. There is no 'one-size-fits-all' approach to planning for attractive, safe and viable evening economies that meet the needs of all social and demographic groups.
- 10.38 It is apparent that Newmarket's night-time economy has acquired a negative stigma over time. It has become particularly associated with the growing youth-orientated and alcohol-driven culture that has fuelled the growth in bars and nightclubs since the 1990s in many of Britain's city and town centres. A significant challenge for centres, such as Newmarket, is that the bar/ nightclub sector could become even more targeted at the younger consumer (aged between 18 and 30). The failure to provide a diverse, attractive and safe evening economy will effectively exclude families and the older more affluent households.
- 10.39 In this context there is a real 'danger' that town centres such as Newmarket could become less diverse, rather than more diverse. As the centre moves towards a 'value-led' more 'downmarket' offer targeted at a younger customer profile, it will represent a significant 'challenge' in the future to try and tempt other social groups back in the

^{§§§§§§§§} In 2007 a study commissioned by Maidstone Borough Council entitled 'Maidstone by Night' estimated that the turnover of the night-time economy was more than £75m. The cost of managing the night-time economy was estimated to be in the region of £650,000. The sector employed some 1,500 direct jobs, including spin-offs such as taxi employment.

future. Many will continue to perceive town centres as 'no-go' areas at night and choose to go elsewhere. The results of the 2011 HTIS indicate that there is a large "leakage" of residents in the CCA who choose to visit competing centres such as Bury St Edmunds, Cambridge and Thetford for night-time activities such as eating and drinking out. This diversion of expenditure away from the town centre will be further exacerbated by the growth of home-based entertainment and technology, as consumers chose to stay home when they partake in leisure and entertainment activities.

- 10.40 Notwithstanding these challenges and threats, there has been significant research over recent years on what makes for successful evening economies. This includes the former Civic Trust's *'Nightvision: Town Centres for All'* (October 2006), which resulted in the Purple Flag accreditation scheme launched by the ATCM in October 2009 and eight NightVision pilot initiatives designed to test the report's findings (including Swindon, Derby, Preston and Norwich). More recently the ATCM and BCSC published *'Better Town Centres at Night'* (2010) which draws together some seven years of original research and the outcomes of the practical pilot projects.
- 10.41 Some of the key findings from this accumulated research provides 'good practice' examples for the potential revitalisation of Newmarket's night-time economy. The experience of NightVision suggests that only a significant and demonstrable improvement in the experience of going out at night will be enough to change negative perceptions. There is also a consensus among practitioners and policy makers that a balance or diversity of town centre land uses, and users, combine to make centres safer and more attractive. There is therefore significant potential to understand the 'missing market' better, broaden the appeal of town centres during the day and evenings, and attract more visitors and expenditure.
- 10.42 In the NightVision pilots, three broad ways of improving performance stood out that are relevant to Newmarket:
- **Overcoming the barriers** – including regulating and managing licensed premises better; managing the public realm; reducing crime and anti-social behaviour; and maintaining and increasing accessibility to town centres at night.
 - **Exploiting opportunities for growth** – including attracting or retaining a more balanced customer range; exploiting physical and heritage assets; understanding and meeting the concerns and aspirations of existing customers and those that are not currently visiting the town centre at night; and "fighting" the negative trend of bad news in the media with positive stories.
 - **Adding value** – including a better policy focus, by making the topic a cross-cutting issue in all relevant strategy documents and policies; creating consensus and partnership; and providing more sophisticated management and marketing.

- 10.43 Planning has an important role to play in shaping the future of town centres at night. The most obvious 'tools' available to local planning authorities are the ability to control changes between types of activity through the Use Classes Order and the allocation of different types of mixed use development in the right places within the town centre. Notwithstanding the changes in the Use Classes Order, statutory controls are too coarse to be effective on their own. Thus, for planning policies to work, they need to be part of the Council's shared vision with different stakeholders, including licensing officers, landlords, police and town centre managers. In terms of 'changing perceptions', the Purple Flag methodology has also been shown to help with promoting the fact that centres are safer and better places for after-hours visitors.
- 10.44 Tourism is also a strong driver of the evening and night-time economies in many of the UK's city and town centres. It is clear that Newmarket is failing to maximise the positive benefits of its race meetings and the related horse racing industry. Future trends suggest that households will increasingly choose city breaks rather than seaside holidays as the recession affects travel spending. This represents an opportunity for Newmarket over the short and long term. The recent opening of the 75-bed Premier Inn is an important step in encouraging over-night visitors. We also understand there are plans for more hotels, ranging from boutique to budget accommodation.
- 10.45 Research shows that, overall, cinema attendances across the UK appear to be holding up well, although this is dependent on the release of 'blockbusters' during the year and the attraction of 3-D films, etc. However, at present, cinema attendees represent a significant "leakage" of expenditure to outside of the catchment area, both in terms of direct ticket purchases as well as other night time activities such as restaurants and bars. Our analysis has highlighted a quantitative and qualitative need for a cinema in Newmarket to help underpin the centre's overall vitality and help create a more diverse evening economy. Cinema visits are a popular leisure activity and our quantitative assessment has shown the theoretical capacity for circa 6 screens over the forecast period up to 2031.
- 10.46 Although recent research by BCSC/ ATCM confirms that there has been a reduction in the frequency of visits and expenditure on eating out during the current economic downturn, it continues to be an "affordable luxury". Although it is a contracted market, it still has potential for growth.
- 10.47 Our analysis also shows a potential capacity for new Class A3-A5 floorspace in 2026 ranging from 1,053 sqm to 2,105 sqm (net) in the District, and increasing to between 1,624 sqm net and 3,249 sqm (net) by 2031.
- 10.48 We also have identified a qualitative need for an additional ten-pin bowling and a new Bingo facility in Newmarket to help reduce current expenditure leakage to competing facilities outside of the District and enhance the town's night-time offer.

- 10.49 The arts and cultural facilities are represented through the provision of the Kings Theatre, and various other cultural facilities such as the National Horseracing Museum. We consider that together these facilities provide an important source of linked trips and spin-off expenditure for the town's other cafes, bars and restaurants.

MILDENHALL

- 10.50 Mildenhall is smaller than Newmarket and functions at a lower level in the retail hierarchy. It does not compete with higher order centres and principally performs a local shopping function. The Council should seek to enhance and consolidate this role over the Local Plan period and Mildenhall should retain its definition as a Town Centre.
- 10.51 Within the adopted Core Strategy, **Vision 3** envisions that Mildenhall will have a vibrant town centre with a broad range of shops and services meeting the needs of the wider catchment area, with new development to enhance the town and aid regeneration, whilst ensuring the needs of the community are met.
- 10.52 In summary, we consider that the relocation of the Sainsbury's has helped enhance the attraction of the town centre to residents in the wider catchment area. Mildenhall's market share for both convenience and comparison goods expenditure has increased since the 2006 Study.
- 10.53 However, the retail assessment has identified a number of weaknesses in Mildenhall's retail offer that could point to a 'fragile' centre if these are not addressed. These weaknesses include:
- Below average representation of non-food comparison goods retail floorspace and outlets
 - Over 25% reduction in the total number of comparison good outlets since 2006.
- 10.54 The Council should continue to focus on meeting the needs of the centre's local catchment population, creating an attractive shopping centre with a good range of everyday service and shopping requirements. In particular, the Council should consider whether the provision of additional car parking is feasible, as this was identified as one of the top things that respondents of the on-street visitor survey in Mildenhall "disliked" about the centre.
- 10.55 We have identified between 664 sqm and 1,328 sqm (net) of convenience goods capacity by 2016, increasing to between 1,558 sqm and 3,116 sqm (net) by 2031. If an appropriate quality foodstore scheme came forward, we believe further floorspace should be supported through the claw back of expenditure of those living in Zone 1. The Council should resist any out of centre foodstore and non-food proposals in the centre's catchment area that would cause detrimental impact on the town's overall vitality and viability.

- 10.56 We have also identified capacity for 295 sqm (net) of comparison goods floorspace by 2021, increasing to 971 sqm (net) by 2031.
- 10.57 Following the development of the social club site by Sainsbury's, The Precincts represents the key development opportunity site in the town centre. It provides the greatest potential to accommodate the appropriate scale and quality of retail floorspace. The overall strategy should be to refurbish/ redevelop this central area.
- 10.58 The Council should set an appropriate policy to guide the mix of uses and prevent the over-concentration of non-A1 uses in order to support the continued predominance of retail uses in the PSA.
- 10.59 We consider that there may be merit in the Council reducing the scope of the proposed Primary Shopping Area for Mildenhall so it includes less tertiary units. This would (likely) increase the proportion of A1 units in the (redefined) PSA and encourage further concentration of retail uses in each centre.
- 10.60 The environmental quality and pedestrian environment throughout Mildenhall should be enhanced over the Local Plan period. The options include the potential full pedestrianisation of Market Place/ Street and the potential for long-term vacant retail premises on Mill Street to be converted to other more appropriate uses.

BRANDON

- 10.61 Brandon is a smaller centre than Newmarket. It does not compete with Newmarket or other higher order centres in the sub-region, and mainly meets the needs of its local catchment population. It should therefore be retained as a Town Centre over the forthcoming Local Plan period.
- 10.62 Within the adopted Core Strategy, **Vision 4** is for Brandon to reinforce itself as the Gateway to the Brecks, with the market town becoming increasingly self-sufficient and meeting the needs of both the residential population and the growing tourism industry.
- 10.63 The redevelopment of the former Co-op unit in the north of the centre by Aldi has helped to promote higher footfall and linked trips to other shops, businesses and facilities on the High Street and across the rest of the town centre. However, the out-of-centre Tesco on London Road continues to perform strongly and does have an influence on food shopping trips to the town centre.
- 10.64 Our analysis identifies capacity for between 296 sqm and 593 sqm (net) of additional convenience goods floorspace by 2016, increasing to between 695 sqm and 1,391 sqm (net) by 2031. We consider that the centre could support a new foodstore operator through the 'claw back' of trade from Tesco and other strong out-of-centre competition. In this context the Council should monitor and resist proposals within the town centre's catchment area that have an adverse impact on Brandon's overall vitality and viability.

- 10.65 There is forecast capacity for an additional 295 sqm (net) of comparison goods floorspace by 2021, increasing to 915 sqm (net) by 2031.
- 10.66 Although there are limited development opportunities in the town centre, we believe there is potential to enhance market share to support a greater level of floorspace than identified in our capacity projections. Any uplift in market share would, however, be minimal due to the centres local 'top up' shopping role, and policy restrictions on the appropriate scale of development.
- 10.67 The priority for the Council should be to continue to consolidate and enhance the town centre over the Local Plan period. In this context we consider that it should proactively encourage the reoccupation of vacant units and should promote investment in town centre enhancement schemes to ensure it remains attractive to local shoppers. In particular, we agree with the findings of the *FHDC RTCS 2006* that improvements to the pedestrian environment and crossing points on the High Street would encourage stronger pedestrian circulation, improve the physical environment and potentially encourage the regeneration of the southern end of the town centre (in particular, Market Hill) for more intensive use.
- 10.68 The emerging Development Management DPD proposes defining the area between Aldi in the north and Market Hill in the south as a Primary Shopping Area (PSA). We consider that this is appropriate.
- 10.69 The *FHDC RTCS 2006* recommended that the Council consider a policy to protect the proportion of A1 shop uses in the centre. It was suggested, for example, that no more than two adjoining units being occupied by an A3 retailer. It was also suggested that the frontage policy should consider taking advantage of the changes in the Use Classes Order to resist A4 and A5 Uses (such as, for example, no more than one A5 use within every ten fasciae).
- 10.70 The Council should set an appropriate policy to guide the mix of uses and prevent the over-concentration of non-A1 uses in order to supports the continued predominance of retail uses in the PSA.
- 10.71 We consider that there may be merit in the Council reducing the scope of the proposed Primary Shopping Area for Mildenhall so it includes less tertiary units. This would (likely) increase the proportion of A1 units in the (redefined) PSA and encourage further concentration of retail uses in each centre.

LAKENHEATH

- 10.72 Within the adopted Core Strategy, **Vision 5** is for Lakenheath to perform more strongly as a Key Service Centre through enhanced retail and leisure services to meet the needs of the local population and sports clubs.

- 10.73 We consider that the recently approved Tesco will play an important role in helping the town meets its designation as a Key Service Centre. We consider that based on current market shares the centre has capacity to accommodate between 243 – 487 sqm (net) additional convenience and 90 sqm (net) additional comparison goods floorspace up to 2031.
- 10.74 The Council should adopt policies that ensure that the importance of shops and services to the local community is taken into account in assessing proposals which would result in their loss or change of use; and respond positively to proposals for the conversion and extension of shops which are designed to improve their viability.

RED LODGE

- 10.75 Within the adopted Core Strategy, **Vision 6** is for Red Lodge to cater sustainably for planned population growth and provide a variety of jobs, shops and community facilities for its residents.
- 10.76 Experian estimate that the 2010 population of Red Lodge is 3,760. This population will almost double upon implementation of extant permissions for dwellings and various supplementary facilities including a supermarket, village shops, a doctor's surgery and other recreational facilities.
- 10.77 As of April 2012, the Council has confirmed that there have been 330 dwelling completions in Red Lodge. There are currently extant planning permission for an additional 570 dwellings and potential for a further 400 dwellings on green field land.
- 10.78 Based on an average household size of 2.4, we estimate that the development would increase the local population by 3,120. We have used the known average expenditure levels in the local area to inform our assessment of the likely spend per capita for new residents. As with the economic capacity modelling we have made an allowance for special forms of trading over the forecast period and have grown expenditure up to 2031 based on Experian forecast rates for both convenience and comparison goods.
- 10.79 Experian reports show that the average (yearly) expenditure on convenience goods per capita within a 1km radius of the area is £1,650 per capita in 2011 (2010 prices), and £2,566 per capita for comparison goods. Table 10.4 shows the new additional expenditure on both convenience and comparison goods expenditure as a result of planned residential growth.

Table 10.4 Total Available Convenience & Comparison Goods Expenditure for Red Lodge (£m)

	2016	2021	2026	2031
Convenience Goods	£5.2	£5.3	£5.4	£5.6
Comparison Goods	£8.9	£10.3	£12.0	£14.0

- 10.80 The forecasts indicate additional retail expenditure of £14.0m in 2016, increasing to £19.6m in 2031. This represents a substantial quantum of new expenditure which will be available locally to support new shops and stores in Red Lodge. We consider that this is sufficient to support the proposed units submitted to the Council as part of the 2011 reserved matters planning application.
- 10.81 We also estimate that the proposed village centre will provide the critical mass necessary to reduce an element of local expenditure which is currently leaking entirely to competing centres and facilities outside of the immediate area and provide a suitable scale of local facilities for new residents.

OUT-OF-CENTRE RETAILING

- 10.82 In terms of out-of-centre retailing, the qualitative and quantitative evidence indicates that the District is well served by foodstores and has a good choice of non-food retail floorspace. There is no demonstrable need for new out-of-centre retailing and, in any case, the significant new investment committed and planned for Newmarket town centre should not be jeopardised or harmed by additional out-of-centre retailing.
- 10.83 In accordance with Government requirements, this Retail Study has forecast the capacity for comparison goods floorspace, and does not disaggregate into the capacity for bulky and non-bulky goods. We do, however, draw on our overall assessment to outline our recommendations in relation to the need for additional 'bulky' goods retail warehousing.
- 10.84 Retail warehousing in the District comprises the Studlands Retail Park. It has a reasonable selection of retail warehouse operators including Homebase, and is trading well at above company average levels. It is evident that Newmarket is currently retaining a reasonable proportion of bulky goods expenditure. However, our analysis has highlighted strong competition from competing retail warehouses in Cambridge and Bury St Edmunds.
- 10.85 If proposals for large format 'bulky' goods retail warehouse floorspace were deemed acceptable and subsequently approved, any planning permission should be accompanied with appropriate conditions to restrict the sale of goods and protect the health of the town centres.
- 10.86 The Council should assess applications for a new DIY retail warehouse on their own merits, within an appropriately defined catchment area, demonstrating that they meet the key sequential and impact 'tests' set out in the NPPF.

CONCLUSIONS

- 10.87 Newmarket is the dominant centre in the study area in terms of the relative scale and quality of its retail offer, as well as its wider town centre uses. However, the evidence

shows that it needs to raise its status and offer in the future to help maintain and strengthen its important role and function in the shopping hierarchy. Otherwise there will be leakage to competing centres, which could detrimentally impact on its overall vitality and viability over the long term.

- 10.88 During this period of economic downturn and uncertainty it is vital that developer, investor and business confidence in the town centre is encouraged and promoted proactively. Fundamental to this, the priority for the Council should be to help deliver sufficient development sites within the town centre with potential for significant new retail-led floorspace over the development plan period. This is supported by the economic forecasts which show that there is capacity for 2,851 sqm (net) of additional comparison goods retail floorspace in Newmarket Town Centre up to 2021, increasing to 8,854 sqm (net) by 2031. This capacity should be directed to the town centre first in accordance with the NPPF.
- 10.89 On the other hand, out-of-centre proposals for new retail and other town centre uses should be resisted where sequentially preferable sites are available, suitable and viable; and/or where proposals would have a harmful impact on either the town centre, or the District's other local centres.
- 10.90 With regard to convenience goods retailing, we have identified quantitative capacity for between 2,058 – 4,115 sqm (net) new floorspace in the District over the development plan period. We consider that Newmarket Town Centre could accommodate approximately half of this identified capacity (between 2,058 sqm and 4,115 sqm net) and that there is a potential qualitative gap in the town centre's main bulk food offer. A superstore operator could therefore help to anchor a major retail-led development scheme in the town centre, depending on the level of market demand.
- 10.91 The majority of the District's smaller centres are relatively healthy. They primarily serve the more frequent day-to-day top-up food and service needs of their local resident catchment populations. In general terms the vitality and viability of these smaller centres is, to varying degrees, anchored by their food and convenience store offer and it is important that this offer is maintained and enhanced where possible. We therefore recommend that a robust vision and strategy be developed to help consolidate and strengthen the important role and status of these smaller centres in the District's shopping hierarchy.
- 10.92 Overall the District's centres remain vital and viable, despite the impact of the downturn in the economy on the retail sector. This notwithstanding, deficiencies have been identified such as the quality gap in the town centre offer and the competition from other centres and shopping facilities. We therefore strongly recommend that this weakness or fragility in the town centre's offer be met head-on through the promotion and delivery of new investment and development.

- 10.93 There are various actions and tools available to the local planning authorities to help promote new retail development and investment. LPAs are encouraged to proactively identify and work with development partners in constructive and progressive ways. This requires leadership and political support from the local authority to champion new development and regeneration initiatives that will have positive benefits for their town centres. It will also require a more proactive, efficient and realistic planning system. Local authorities should look at regeneration as a mechanism to improve the local economy and urban environment, and provide greater choice for the local community. It should not necessarily be regarded as an opportunity to add a host of additional planning gains to proposals, as this has overburdened many of the recent development projects that have been shelved.
- 10.94 As the country struggles to emerge from the worst ravages of the economic recession, it is clear that there are many cities and towns in Britain that need the injection of new investment, development and regeneration in order for them to compete and move forward. Forest Heath should be proactive in encouraging and securing new investment in the District's centres in order to ensure that the District meets the needs of existing (and future) residents.

11.0 GLOSSARY OF TERMS

CITY CENTRES:	The highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. Planning for the future of such areas can be achieved successfully through the use of area action plans, with master plans or development briefs for particular sites. In London the international and metropolitan centres identified in the Mayor's Spatial Development Strategy typically perform the role of city centres.
TOWN CENTRES:	Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the major and many of the district centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.
DISTRICT CENTRES:	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
LOCAL CENTRES:	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.
TOWN CENTRE AREA:	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on a proposals map.
PRIMARY SHOPPING AREA (PSA)	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area. <i>[In PPS6 the centre for a retail development constitutes the primary shopping area].</i>
PRIMARY FRONTAGE	Primary frontages are likely to include a high proportion of retail uses.
SECONDARY FRONTAGE	Secondary frontages provide greater opportunities for a diversity of uses.
EDGE-OF-CENTRE	For retail purposes, a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area. For all other main town centre uses, this is likely to be within 300 metres of a town centre boundary. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances. For example, local topography will affect pedestrians' perceptions of easy walking distance from the centre. Other considerations

	include barriers, such as crossing major roads and car parks, the attractiveness and perceived safety of the route and the strength of attraction and size of the town centre. A site will not be well connected to a centre where it is physically separated from it by a barrier such as a major road, railway line or river and there is no existing or proposed pedestrian route which provides safe and convenient access to the centre.
OUT-OF-CENTRE	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
OUT-OF-TOWN	An out-of-centre development outside the existing urban area.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
SUPERMARKETS	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
SUPERSTORES	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
RETAIL WAREHOUSES	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
RETAIL PARKS	An agglomeration of at least 3 retail warehouses.
WAREHOUSE CLUBS	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
FACTORY OUTLET CENTRES	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.
REGIONAL & SUB-REGIONAL SHOPPING CENTRES	Out-of-centre shopping centres which are generally over shopping centres 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.
LEISURE PARKS	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.
CONVENIENCE GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.
COMPARISON GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
SPECIAL FORMS OF	All retail sales not in shops and stores; including sales via the internet, mail

TRADING	order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.
GROSS GROUND FLOOR FOOTPRINT FLOORSPACE	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
GROSS RETAIL FLOORSPACE	The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
NET RETAIL SALES AREA	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
RETAIL SALES DENSITY	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
FLOORSPACE EFFICIENCY FACTOR	The percentage by which a retail sales density is assumed to increase annually in real terms over a stated period.

– END –

APPENDIX 1: CATCHMENT AREA MAP

APPENDIX 2: HOUSEHOLD SURVEY – QUESTIONNAIRE

APPENDIX 3: STREET INTERVIEW SURVEYS – QUESTIONNAIRE

**APPENDIX 4: NEWMARKET TOWN CENTRE – EXPERIAN GOAD
CENTRE REPORT**

APPENDIX 5: MARKET SHARE TABULATIONS – CONVENIENCE

APPENDIX 6: MARKET SHARE TABULATIONS – COMPARISON

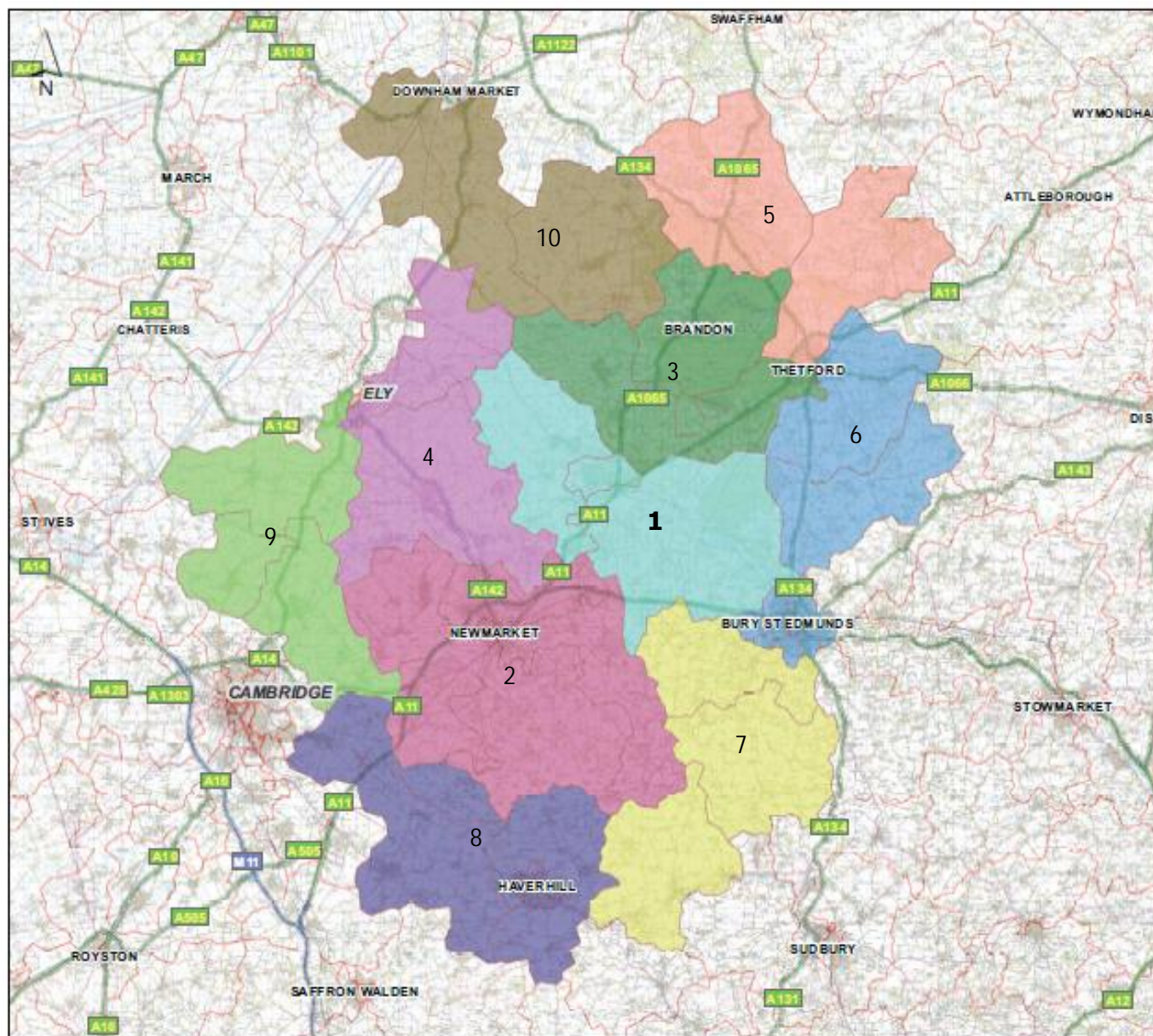
APPENDIX 7: CONVENIENCE CAPACITY ASSESSMENT

APPENDIX 8: COMPARISON CAPACITY ASSESSMENT

APPENDIX 9: RETAIL SECTOR TRENDS

APPENDIX 10: COMMERCIAL LEISURE TRENDS

APPENDIX 11: OPPORTUNITY SITE ASSESSMENT



Legend

Zones

- 1 Core Catchment Area (CCA)
- 2 Core Catchment Area (CCA)
- 3 Core Catchment Area (CCA)
- 4 Deconcentrated Catchment Area (CCA)
- 5 Outer Catchment Area (CCA)
- 6 Outer Catchment Area (CCA)
- 7 Outer Catchment Area (CCA)
- 8 Outer Catchment Area (CCA)
- 9 Outer Catchment Area (CCA)
- 10 Deconcentrated Catchment Area (CCA)
- Postal Sector



**Forest Heath
Postal Sector Zones**

Not to scale - September 2009
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Job No. 280711

Forest Heath Household Survey

Good morning / afternoon / evening, my name is from NEMS Market Research, an independent market research company. We are conducting a short survey into the shopping behaviour of people in the area on behalf of Forest Heath District Council to help improve the retail and leisure provision in the area. Do you have a few minutes to answer some questions?

QA Are you the person responsible for main food shopping in your household?

Yes
No

IF 'YES' – CONTINUE INTERVIEW.

IF 'NO' – ASK - COULD I SPEAK TO THE PERSON WHO IS RESPONSIBLE FOR MOST OF THE SHOPPING, IF NOT AVAILABLE THANK AND CLOSE INTERVIEW

Q01 Where do you normally go for your household's main food and grocery shopping i.e. primarily bulk 'trolley' purchases?

DO NOT READ OUT. ONE ANSWER ONLY

IF OTHER, PLEASE SPECIFY THE FOOD STORE NAME, ROAD/STREET NAME AND AREA e.g. ASDA, GODDARD ROAD, IPSWICH

- 001 Aldi, 62 High Street, Brandon
- 002 Aldi, Girling Street, Sudbury
- 003 Aldi, Lime Kiln Lane, Thetford
- 004 Aldi, Lordscroft Lane, Haverhill
- 005 Aldi, Queen Mary Road, King's Lynn
- 006 Aldi, Sandyland Street, Wisbech
- 007 Asda, Beehive Centre, Coldhams Lane, Cambridge
- 008 Asda, Leverington Road, Wisbech
- 009 Asda, Oaks Drive, Newmarket
- 010 Asda, Western Way, Bury St. Edmunds
- 011 Budgens, Clay Street, Soham
- 012 Budgens, Fordham Road, Cambridge
- 013 Co-op, 46-50 High Street, Lakenheath
- 014 Co-op, Elizabeth Parade, Town Centre, Newmarket
- 015 Co-op, High Street, Soham
- 016 Co-op, Jubilee Walk, Haverhill
- 017 Co-op, Kings Street, Mildenhall
- 018 Co-op, Market Hill, Clare
- 019 Co-op, Mildenhall Road, Bury St. Edmunds
- 020 Co-op, Mill Street, Isleham
- 021 Co-op, North Street, Burwell
- 022 Co-op, Western Way, Bury St. Edmunds
- 023 Iceland, Brays Lane/ Newham Street, Ely
- 024 Iceland, Cornhill, Bury St. Edmunds
- 025 Iceland, Crown Walk, Newmarket
- 026 Iceland, Histon Road, Cambridge
- 027 Iceland, Minstergate Street, Thetford
- 028 Iceland, Prince of Wales Court, Downham Market
- 029 Londis, Oxford Street, Exning
- 030 Marks & Spencer, Buttermarket, Bury St. Edmunds
- 031 Marks & Spencer, The Rookery, Newmarket
- 032 Morrisons, Bridge Street, Downham Market
- 033 Morrisons, Broad Street, Cambourne
- 034 Morrisons, Coburg Street, King's Lynn
- 035 Morrisons, Victoria Road, Ely
- 036 One Stop, Thetford Road, Brandon
- 037 Post Office and Village Store, Moulton Avenue, Kentford
- 038 Sainsbury's, Hancocks Road, Hanchett End, Haverhill
- 039 Sainsbury's, Bedingfield Way, Moreton Hall, Bury St. Edmunds
- 040 Sainsbury's, Brooks Road, Coldhams Lane, Cambridge
- 041 Sainsbury's, Cocksedge, St. Andrews Street, Mildenhall
- 042 Sainsbury's, London Road, Thetford
- 043 Sainsbury's, St Dominics Square, Vancouver Centre, King's Lynn
- 044 Somerfield, Bridge Street, Downham Market
- 045 Somerfield, Churchill Road, Wisbech
- 046 Somerfield, High Street, Watton
- 047 Spar, High Street, Brandon
- 048 Tesco Express, 30 High Street, Cambridge
- 049 Tesco Express, Horringer, Bury St. Edmunds
- 050 Tesco Express, Norwich Road, Thetford
- 051 Tesco Extra, Viking Road, Bar Hill
- 052 Tesco, Angel Drove, Ely
- 053 Tesco, Cambridge Road Industrial Estate, Milton
- 054 Tesco, Cheddars Lane, Newmarket Road, Cambridge
- 055 Tesco, Fordham Road, Newmarket
- 056 Tesco, Hardwick Road, King's Lynn
- 057 Tesco, Haverhill
- 058 Tesco, London Road, Brandon
- 059 Tesco, London Road, Downham Market
- 060 Tesco, Norwich Road, Thetford
- 061 Tesco, Southend Road, Hunstanton
- 062 Tesco, St. Saviours Interchange, Bury St. Edmunds
- 063 Tesco, Thetford Road, Thetford

- 064 Tesco, Woodhall Business Park, Springlands Way, Sudbury
- 065 Tesco, Yarrow Road, Cherry Hinton, Cambridge
- 066 Village Store, Beeches Road, West Row
- 067 Waitrose, Brays Lane, Ely
- 068 Waitrose, Castle Acre Road, Swaffham
- 069 Waitrose, Fred Archer Way, Newmarket
- 070 Waitrose, Hauxton Road, Trumpington
- 071 Waitrose, Robert Bobby Way, Bury St. Edmunds
- 072 Waitrose, Station Road, Sudbury
- 073 Local shops / markets in Brandon
- 074 Local shops / markets in Exning
- 075 Local shops / markets in Kentford
- 076 Local shops / markets in Lakenheath
- 077 Local shops / markets in Mildenhall
- 078 Local shops / markets in Newmarket
- 079 Local shops / markets in West Row
- 080 Internet / mail order (PLEASE WRITE IN)
- 081 Other (PLEASE WRITE IN)
- 082 (Don't know / varies)

GOTO Q05

Excluding those who shop via the Internet at Q01

Q02 What is the main reason you choose (STORE MENTIONED AT Q01) to do your main food and grocery shopping?

DO NOT READ OUT. ONE ANSWER ONLY

- 1 Accessibility by public transport
- 2 Choice / price of non- food goods (e.g. clothes, DVDs, etc)
- 3 Choice of food goods available
- 4 Clean shopping environment
- 5 Clubcard / Rewards system
- 6 Convenient to home
- 7 Convenient to work
- 8 Free car parking
- 9 Good car parking provision
- A Good shopping environment
- B Low prices
- C Part of shopping trip for non-food goods
- D Preference for retailer
- E Provision of leisure services nearby
- F Provision of services nearby, such as banks and other financial services
- G Quality of fresh food
- H Safe (during the day)
- I Safe (during the evening /night time)
- J Use of cafe
- K Use of cash point / ATM
- L Provision of petrol station / car wash
- M Provision of self service tills
- N Provision of delicatessen / bakery / fresh fish counter etc
- O Other (PLEASE WRITE IN)
- P (Don't know / varies)

Excluding those who shop via the Internet at Q01

Q03 How do you normally travel to (STORE / DESTINATION MENTIONED AT Q01)?

DO NOT READ OUT. ONE ANSWER ONLY.

- 1 Car / van (as driver)
- 2 Car / van (as passenger)
- 3 Bus, minibus or coach
- 4 Using park & ride facility
- 5 Motorcycle, scooter or moped
- 6 Walk
- 7 Taxi
- 8 Train
- 9 Bicycle
- A Mobility scooter
- B Other (PLEASE WRITE IN)
- C Not applicable / goods delivered
- D (Don't know / varies)

Excluding those who shop via the Internet at Q01

Q04 How often do you normally do your main food shopping at (STORE / DESTINATION MENTIONED AT Q01)?

DO NOT READ OUT. ONE ANSWER ONLY.

- 1 More than once a week
- 2 Once a week
- 3 Once a fortnight
- 4 Once a month
- 5 Less often
- 6 Varies
- 7 (Don't know)

Q05 In addition to (STORE MENTIONED AT Q01), is there any other store that you regularly use for your main-food shopping?

DO NOT READ OUT. ONE ANSWER ONLY

IF OTHER, PLEASE SPECIFY THE FOOD STORE NAME, ROAD / STREET NAME AND AREA e.g. ASDA, GODDARD ROAD, IPSWICH

- 001 Aldi, 62 High Street, Brandon
- 002 Aldi, Girling Street, Sudbury
- 003 Aldi, Lime Kiln Lane, Thetford
- 004 Aldi, Lordscroft Lane, Haverhill
- 005 Aldi, Queen Mary Road, King's Lynn
- 006 Aldi, Sandyland Street, Wisbech
- 007 Asda, Beehive Centre, Coldhams Lane, Cambridge
- 008 Asda, Leverington Road, Wisbech
- 009 Asda, Oaks Drive, Newmarket
- 010 Asda, Western Way, Bury St. Edmunds
- 011 Budgens, Clay Street, Soham
- 012 Budgens, Fordham Road, Cambridge
- 013 Co-op, 46-50 High Street, Lakenheath
- 014 Co-op, Elizabeth Parade, Town Centre, Newmarket
- 015 Co-op, High Street, Soham
- 016 Co-op, Jubilee Walk, Haverhill
- 017 Co-op, Kings Street, Mildenhall
- 018 Co-op, Market Hill, Clare
- 019 Co-op, Mildenhall Road, Bury St. Edmunds
- 020 Co-op, Mill Street, Isleham
- 021 Co-op, North Street, Burwell
- 022 Co-op, Western Way, Bury St. Edmunds
- 023 Iceland, Brays Lane/ Newham Street, Ely
- 024 Iceland, Cornhill, Bury St. Edmunds
- 025 Iceland, Crown Walk, Newmarket
- 026 Iceland, Histon Road, Cambridge
- 027 Iceland, Minstergate Street, Thetford
- 028 Iceland, Prince of Wales Court, Downham Market
- 029 Londis, Oxford Street, Exning
- 030 Marks & Spencer, Buttermarket, Bury St. Edmunds
- 031 Marks & Spencer, The Rookery, Newmarket
- 032 Morrisons, Bridge Street, Downham Market
- 033 Morrisons, Broad Street, Cambourne
- 034 Morrisons, Coburg Street, King's Lynn
- 035 Morrisons, Victoria Road, Ely
- 036 One Stop, Thetford Road, Brandon
- 037 Post Office and Village Store, Moulton Avenue, Kentford
- 038 Sainsbury's , Hancocks Road, Hanchett End, Haverhill
- 039 Sainsbury's, Beddingfield Way, Moreton Hall, Bury St. Edmunds
- 040 Sainsbury's, Brooks Road, Coldhams Lane, Cambridge
- 041 Sainsbury's, Cocksedge, St. Andrews Street, Mildenhall
- 042 Sainsbury's, London Road, Thetford
- 043 Sainsbury's, St Dominics Square, Vancouver Centre, King's Lynn
- 044 Somerfield, Bridge Street, Downham Market
- 045 Somerfield, Churchill Road, Wisbech
- 046 Somerfield, High Street, Watton
- 047 Spar, High Street, Brandon
- 048 Tesco Express, 30 High Street, Cambridge
- 049 Tesco Express, Horringer, Bury St. Edmunds
- 050 Tesco Express, Norwich Road, Thetford
- 051 Tesco Extra, Viking Road, Bar Hill
- 052 Tesco, Angel Drove, Ely
- 053 Tesco, Cambridge Road Industrial Estate, Milton
- 054 Tesco, Cheddars Lane, Newmarket Road, Cambridge
- 055 Tesco, Fordham Road, Newmarket
- 056 Tesco, Hardwick Road, King's Lynn
- 057 Tesco, Haverhill
- 058 Tesco, London Road, Brandon
- 059 Tesco, London Road, Downham Market
- 060 Tesco, Norwich Road, Thetford
- 061 Tesco, Southend Road, Hunstanton
- 062 Tesco, St. Saviours Interchange, Bury St. Edmunds
- 063 Tesco, Thetford Road, Thetford
- 064 Tesco, Woodhall Business Park, Springlands Way, Sudbury
- 065 Tesco, Yarrow Road, Cherry Hinton, Cambridge
- 066 Village Store, Beeches Road, West Row
- 067 Waitrose, Brays Lane , Ely
- 068 Waitrose, Castle Acre Road, Swaffham
- 069 Waitrose, Fred Archer Way, Newmarket
- 070 Waitrose, Hauxton Road, Trumpington
- 071 Waitrose, Robert Bobby Way, Bury St. Edmunds
- 072 Waitrose, Station Road, Sudbury
- 073 Local shops / markets in Brandon
- 074 Local shops / markets in Exning
- 075 Local shops / markets in Kentford
- 076 Local shops / markets in Lakenheath
- 077 Local shops / markets in Mildenhall
- 078 Local shops / markets in Newmarket
- 079 Local shops / markets in West Row
- 080 Internet / mail order (PLEASE WRITE IN)
- 081 Other (PLEASE WRITE IN)
- 082 (Don't know)
- 083 (No other stores mentioned)

GOTO Q07

Those who use an additional store to do their main food shopping at Q05

Q06 How often do you normally visit the (STORE MENTIONED AT Q05)?

DO NOT READ OUT. ONE ANSWER ONLY

- 1 More than once a week
- 2 Once a week
- 3 Once a fortnight
- 4 Once a month
- 5 Less often
- 6 Varies
- 7 (Don't know)

Q07 Of all the money you spend when you buy your main grocery shopping, on average what share goes on non-food items?

PROMPT IF NECESSARY. ONE ANSWER ONLY.

- 1 0-10%
- 2 11-20%
- 3 21-30%
- 4 31-40%
- 5 41-50%
- 6 51-60%
- 7 61-70%
- 8 71-80%
- 9 81-90%
- A 91-100%
- B (Don't know / varies)
- C (Don't combine main with non food)

Q08 When you go shopping for main food goods, do you normally combine your trip with other activities or purchases?

DO NOT READ OUT. CAN BE MULTICODED

- | | | |
|---|--|-----------|
| 1 | Yes – non-food shopping | GO TO Q09 |
| 2 | Yes – leisure activity | GO TO Q10 |
| 3 | Yes – travelling to / from work | GO TO Q11 |
| 4 | Yes – travelling to / from school / college | GO TO Q11 |
| 5 | Yes - other food shopping | GO TO Q11 |
| 6 | Yes – visiting services such as banks and other financial institutions | GO TO Q11 |
| 7 | Yes - petrol station / car wash | GO TO Q11 |
| 8 | Yes - recycling facilities | GO TO Q11 |
| 9 | Yes - childcare / nursery / after school activity | GO TO Q11 |
| A | Yes - other (PLEASE WRITE IN) | GO TO Q11 |
| B | No | GO TO Q11 |
| C | (Don't know / varies) | GO TO Q11 |

Those who combine their main food shopping trip with non-food shopping at Q08

Q09 Where do you buy non-food goods when you combine it with your main food shopping?

DO NOT READ OUT. ONE ANSWER ONLY

- 001 In-store
- 002 Newmarket Town Centre
- 003 Newmarket Rookery Shopping Centre
- 004 Newmarket Studlands / Fordham Retail Park
- 005 Brandon Town Centre
- 006 Bury St. Edmunds
- 007 Cambourne
- 008 Cambridge
- 009 Clare
- 010 Downham Market
- 011 Ely Town Centre
- 012 Haverhill
- 013 Ipswich
- 014 King's Lynn
- 015 Lakenheath Local Centre
- 016 Mildenhall Town Centre
- 017 Newmarket
- 018 Norwich
- 019 Sudbury
- 020 Swaffam
- 021 Thetford
- 022 Wisbech
- 023 Other (PLEASE WRITE IN)
- 024 (Don't know / can't remember/ varies)

Those who combine their main food shopping trip with leisure activities at Q08

Q10 Where do you go for leisure activities when it's linked to your main food shopping?

DO NOT READ OUT. ONE ANSWER ONLY

Newmarket:

- 001 Newmarket Leisure Centre
- 002 Newmarket Studlands Park Community Centre
- 003 Newmarket George Lambton Playing Fields
- 004 Newmarket Town Centre

Brandon:

- 005 Brandon Leisure Centre
- 006 Brandon Town Centre

Mildenhall:

- 007 Mildenhall - Dome Leisure Centre
- 008 Mildenhall Community Centre
- 009 Mildenhall Town Centre

Bury St. Edmunds:

- 010 Red Lodge Sports Pavilion
- 011 Bury St. Edmunds Town Centre

Other Towns / Locations:

- 012 Cambourne
- 013 Cambridge
- 014 Clare
- 015 Downham Market
- 016 Ely Town Centre
- 017 Haverhill
- 018 Ipswich
- 019 King's Lynn
- 020 Norwich
- 021 Sudbury
- 022 Swaffam
- 023 Thetford
- 024 Wisbech
- 025 Other (PLEASE WRITE IN)
- 026 (Don't know / can't remember)

Q11 Where do you normally do most of your household's more frequent (2-3 times per week) shopping for small scale 'top-up' basket food and convenience goods items (including newspapers, bread, milk and tobacco products)?

DO NOT READ OUT. ONE ANSWER ONLY

IF OTHER, PLEASE SPECIFY THE FOOD STORE NAME, ROAD/STREET NAME AND AREA e.g. ASDA, GODDARD ROAD, IPSWICH

- 001 Aldi, 62 High Street, Brandon
- 002 Aldi, Girling Street, Sudbury
- 003 Aldi, Lime Kiln Lane, Thetford
- 004 Aldi, Lordscroft Lane, Haverhill
- 005 Aldi, Queen Mary Road, King's Lynn
- 006 Aldi, Sandyland Street, Wisbech
- 007 Asda, Beehive Centre, Coldhams Lane, Cambridge
- 008 Asda, Leverington Road, Wisbech
- 009 Asda, Oaks Drive, Newmarket
- 010 Asda, Western Way, Bury St. Edmunds
- 011 Budgens, Clay Street, Soham
- 012 Budgens, Fordham Road, Cambridge
- 013 Co-op, 46-50 High Street, Lakenheath
- 014 Co-op, Elizabeth Parade, Town Centre, Newmarket
- 015 Co-op, High Street, Soham
- 016 Co-op, Jubilee Walk, Haverhill
- 017 Co-op, Kings Street, Mildenhall
- 018 Co-op, Market Hill, Clare
- 019 Co-op, Mildenhall Road, Bury St. Edmunds
- 020 Co-op, Mill Street, Isleham
- 021 Co-op, North Street, Burwell
- 022 Co-op, Western Way, Bury St. Edmunds
- 023 Iceland, Brays Lane/ Newham Street, Ely
- 024 Iceland, Cornhill, Bury St. Edmunds
- 025 Iceland, Crown Walk, Newmarket
- 026 Iceland, Histon Road, Cambridge
- 027 Iceland, Minstergate Street, Thetford
- 028 Iceland, Prince of Wales Court, Downham Market
- 029 Londis, Oxford Street, Exning
- 030 Marks & Spencer, Buttermarket, Bury St. Edmunds
- 031 Marks & Spencer, The Rookery, Newmarket
- 032 Morrisons, Bridge Street, Downham Market
- 033 Morrisons, Broad Street, Cambourne
- 034 Morrisons, Coburg Street, King's Lynn
- 035 Morrisons, Victoria Road, Ely
- 036 One Stop, Thetford Road, Brandon
- 037 Post Office and Village Store, Moulton Avenue, Kentford
- 038 Sainsbury's, Hancocks Road, Hanchett End, Haverhill
- 039 Sainsbury's, Beddingfield Way, Moreton Hall, Bury St. Edmunds
- 040 Sainsbury's, Brooks Road, Coldhams Lane, Cambridge
- 041 Sainsbury's, Cocksedge, St. Andrews Street, Mildenhall
- 042 Sainsbury's, London Road, Thetford
- 043 Sainsbury's, St Dominics Square, Vancouver Centre, King's Lynn
- 044 Somerfield, Bridge Street, Downham Market
- 045 Somerfield, Churchill Road, Wisbech
- 046 Somerfield, High Street, Watton

047 Spar, High Street, Brandon
 048 Tesco Express, 30 High Street, Cambridge
 049 Tesco Express, Horringer, Bury St. Edmunds
 050 Tesco Express, Norwich Road, Thetford
 051 Tesco Extra, Viking Road, Bar Hill
 052 Tesco, Angel Drove, Ely
 053 Tesco, Cambridge Road Industrial Estate, Milton
 054 Tesco, Cheddars Lane, Newmarket Road, Cambridge
 055 Tesco, Fordham Road, Newmarket
 056 Tesco, Hardwick Road, King's Lynn
 057 Tesco, Haverhill
 058 Tesco, London Road, Brandon
 059 Tesco, London Road, Downham Market
 060 Tesco, Norwich Road, Thetford
 061 Tesco, Southend Road, Hunstanton
 062 Tesco, St. Saviours Interchange, Bury St. Edmunds
 063 Tesco, Thetford Road, Thetford
 064 Tesco, Woodhall Business Park, Springlands Way, Sudbury
 065 Tesco, Yarrow Road, Cherry Hinton, Cambridge
 066 Village Store, Beeches Road, West Row
 067 Waitrose, Brays Lane , Ely
 068 Waitrose, Castle Acre Road, Swaffham
 069 Waitrose, Fred Archer Way, Newmarket
 070 Waitrose, Hauxton Road, Trumpington
 071 Waitrose, Robert Bobby Way, Bury St. Edmunds
 072 Waitrose, Station Road, Sudbury
 073 Local shops / markets in Brandon
 074 Local shops / markets in Exning
 075 Local shops / markets in Kentford
 076 Local shops / markets in Lakenheath
 077 Local shops / markets in Mildenhall
 078 Local shops / markets in Newmarket
 079 Local shops / markets in West Row
 080 Internet / Mail Order (PLEASE WRITE IN)
 081 Other (PLEASE WRITE IN)
 082 (Do not do this type of shopping)
 083 (Don't know / varies)

I would now like to ask you some questions about non-food shopping:

Q12 Where do you normally do most of your household's shopping for (womens, mens, childrens and baby) clothing & footwear items?

DO NOT READ OUT. ONE ANSWER ONLY

INTERVIEWERS PLEASE PROBE FULLY FOR A STORE NAME, ROAD, LOCATION (TOWN OR OUT OF CENTRE) AND TYPE RESPONSE UNDER 'OTHER'

IF 'OTHER' NOTE WHETHER TOWN CENTRE, RETAIL PARK OR STORE (including road name, location)

If internet, specify retailer under other, e.g 'Internet - Amazon'

Specific Stores:

- 001 B&Q, Risbygate Street, Bury St. Edmunds
- 002 DFS, Easlea Way, Bury St. Edmunds
- 003 Homebase, Ashdon Road, Saffron Walden
- 004 Homebase, Newmarket Road, Cambridge
- 005 Homebase, Oaks Drive, Newmarket
- 006 Homebase, Waldingfield Road/Northern Road, Sudbury
- 007 Matalan, Easlea Way, Bury St. Edmunds

Retail Parks / Shopping Centres:

- 008 Anglia Retail Park, Ipswich
- 009 Beehive Centre, Cambridge
- 010 Braintree Retail Park, Braintree
- 011 Cambridge Retail Park, Cambridge
- 012 Cambridge Retail Park, Haverhill
- 013 Chapelfield Shopping Centre, Norwich
- 014 Colchester Retail Park, Colchester
- 015 Colne View Retail Park, Colchester
- 016 Copdock Retail Park, Copdock
- 017 Forest Retail Park, Thetford
- 018 Grafton Centre, Cambridge
- 019 Hardwick Retail Park, Kings Lynn
- 020 Lakeside Shopping Centre, West Thurrock
- 021 Meadow Centre, Stowmarket
- 022 Moreton Hall Retail Park, Bury St. Edmunds
- 023 Pier Point Retail Park, Kings Lynn
- 024 Riverside Retail Park, Norwich
- 025 Robert Bobby Way Retail Park, Bury St. Edmunds
- 026 Shawlands Retail Park, Sudbury
- 027 St Edmundsbury Retail Park, Bury St. Edmunds
- 028 St. Nicholas Retail Park, Kings Lynn
- 029 Studlands/Fordham Retail Park, Newmarket
- 030 The Buttermarket, Ipswich
- 031 The Mall Shopping Centre, Norwich
- 032 Thetford Retail Park, Thetford
- 033 Tollgate Centre, Colchester
- 034 Tower Ramparts, Ipswich

Town Centres:

- 035 Bedford
- 036 Braintree
- 037 Brandon
- 038 Bury St. Edmunds
- 039 Cambourne
- 040 Cambridge
- 041 Clare
- 042 Copdock
- 043 Downham Market
- 044 Ely
- 045 Haverhill
- 046 Hunstanton
- 047 Ipswich
- 048 Isleham
- 049 King's Lynn
- 050 Mildenhall
- 051 Milton
- 052 Newmarket
- 053 Norwich
- 054 Peter District
- 055 RAF Base, Lakenheath
- 056 RAF Base, Mildenhall
- 057 Saffron Walden -
- 058 Soham
- 059 Stowmarket
- 060 Sudbury
- 061 Swaffham
- 062 Thetford
- 063 Wisbech

Others:

- 064 Catalogue / mail order
- 065 Internet (PLEASE WRITE IN)
- 066 Other (PLEASE WRITE IN)
- 067 (Don't know / can't remember)
- 068 (Do not do this shopping)

Q13 Where do you normally do most of your household's shopping for furniture and furnishings, carpets and other floor coverings (such as beds, sofas, tables, fitted DO NOT READ OUT. ONE ANSWER ONLY
INTERVIEWERS PLEASE PROBE FULLY FOR A STORE NAME, ROAD, LOCATION (TOWN OR OUT OF CENTRE) AND TYPE RESPONSE UNDER 'OTHER'
IF 'OTHER' NOTE WHETHER TOWN CENTRE, RETAIL PARK OR STORE (including road name, location)
If internet, specify retailer under other, e.g 'Internet - Amazon'

Specific Stores:

- 001 B&Q, Risbygate Street, Bury St. Edmunds
- 002 DFS, Easlea Way, Bury St. Edmunds
- 003 Homebase, Ashdon Road, Saffron Walden
- 004 Homebase, Newmarket Road, Cambridge
- 005 Homebase, Oaks Drive, Newmarket
- 006 Homebase, Waldingfield Road/Northern Road, Sudbury
- 007 Matalan, Easlea Way, Bury St. Edmunds

Retail Parks / Shopping Centres:

- 008 Anglia Retail Park, Ipswich
- 009 Beehive Centre, Cambridge
- 010 Braintree Retail Park, Braintree
- 011 Cambridge Retail Park, Cambridge
- 012 Cambridge Retail Park, Haverhill
- 013 Chapelfield Shopping Centre, Norwich
- 014 Colchester Retail Park, Colchester
- 015 Colne View Retail Park, Colchester
- 016 Copdock Retail Park, Copdock
- 017 Forest Retail Park, Thetford
- 018 Grafton Centre, Cambridge
- 019 Hardwick Retail Park, Kings Lynn
- 020 Lakeside Shopping Centre, West Thurrock
- 021 Meadow Centre, Stowmarket
- 022 Moreton Hall Retail Park, Bury St. Edmunds
- 023 Pier Point Retail Park, Kings Lynn
- 024 Riverside Retail Park, Norwich
- 025 Robert Bobby Way Retail Park, Bury St. Edmunds
- 026 Shawlands Retail Park, Sudbury
- 027 St Edmundsbury Retail Park, Bury St. Edmunds
- 028 St. Nicholas Retail Park, Kings Lynn
- 029 Studlands/Fordham Retail Park, Newmarket
- 030 The Buttermarket, Ipswich
- 031 The Mall Shopping Centre, Norwich
- 032 Thetford Retail Park, Thetford
- 033 Tollgate Centre, Colchester
- 034 Tower Ramparts, Ipswich

Town Centres:

- 035 Bedford
- 036 Braintree
- 037 Brandon
- 038 Bury St. Edmunds
- 039 Cambourne
- 040 Cambridge
- 041 Clare
- 042 Copdock
- 043 Downham Market
- 044 Ely
- 045 Haverhill
- 046 Hunstanton
- 047 Ipswich
- 048 Isleham
- 049 King's Lynn
- 050 Mildenhall
- 051 Milton
- 052 Newmarket
- 053 Norwich
- 054 Peter District
- 055 RAF Base, Lakenheath
- 056 RAF Base, Mildenhall
- 057 Saffron Walden -
- 058 Soham
- 059 Stowmarket
- 060 Sudbury
- 061 Swaffham
- 062 Thetford
- 063 Wisbech

Others:

- 064 Catalogue / mail order
- 065 Internet (PLEASE WRITE IN)
- 066 Other (PLEASE WRITE IN)
- 067 (Don't know / can't remember)
- 068 (Do not do this shopping)

Q14 Where do you normally do most of your household's shopping for hardware, DIY goods, decorating supplies and garden products (such as drills, lawn mowers, hammers, hedge cutters, garden tools, plants, shrubs etc)?
DO NOT READ OUT. ONE ANSWER ONLY
INTERVIEWERS PLEASE PROBE FULLY FOR A STORE NAME, ROAD, LOCATION (TOWN OR OUT OF CENTRE) AND TYPE RESPONSE UNDER 'OTHER'
IF 'OTHER' NOTE WHETHER TOWN CENTRE, RETAIL PARK OR STORE (including road name, location)
If internet, specify retailer under other, e.g 'Internet - Amazon'

Specific Stores:

- 001 B&Q, Risbygate Street, Bury St. Edmunds
- 002 DFS, Easlea Way, Bury St. Edmunds
- 003 Homebase, Ashdon Road, Saffron Walden
- 004 Homebase, Newmarket Road, Cambridge
- 005 Homebase, Oaks Drive, Newmarket
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- 017 Forest Retail Park, Thetford
- 018 Grafton Centre, Cambridge
- 019 Hardwick Retail Park, Kings Lynn
- 020 Lakeside Shopping Centre, West Thurrock
- 021 Meadow Centre, Stowmarket
- 022 Moreton Hall Retail Park, Bury St. Edmunds
- 023 Pier Point Retail Park, Kings Lynn
- 024 Riverside Retail Park, Norwich
- 025 Robert Bobby Way Retail Park, Bury St. Edmunds
- 026 Shawlands Retail Park, Sudbury
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- 029 Studlands/Fordham Retail Park, Newmarket
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- 034 Tower Ramparts, Ipswich

Town Centres:

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- 038 Bury St. Edmunds
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- 041 Clare
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- 050 Mildenhall
- 051 Milton
- 052 Newmarket
- 053 Norwich
- 054 Peter District
- 055 RAF Base, Lakenheath
- 056 RAF Base, Mildenhall
- 057 Saffron Walden -
- 058 Soham
- 059 Stowmarket
- 060 Sudbury
- 061 Swaffham
- 062 Thetford
- 063 Wisbech

Others:

- 064 Catalogue / mail order
- 065 Internet (PLEASE WRITE IN)
- 066 Other (PLEASE WRITE IN)
- 067 (Don't know / can't remember)
- 068 (Do not do this shopping)

Q15 Where do you normally do most of your shopping for audio visual, photographic, computer items (such as stereos, radios, TVs, software, cameras, telephones, CDs & DVDs etc)?

DO NOT READ OUT. ONE ANSWER ONLY

INTERVIEWERS PLEASE PROBE FULLY FOR A STORE NAME, ROAD, LOCATION (TOWN OR OUT OF CENTRE) AND TYPE RESPONSE UNDER 'OTHER'

IF 'OTHER' NOTE WHETHER TOWN CENTRE, RETAIL PARK OR STORE (including road name, location)

If internet, specify retailer under other, e.g 'Internet - Amazon'

Specific Stores:

- 001 B&Q, Risbygate Street, Bury St. Edmunds
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- 004 Homebase, Newmarket Road, Cambridge
- 005 Homebase, Oaks Drive, Newmarket
- 006 Homebase, Waldingfield Road/Northern Road, Sudbury
- 007 Matalan, Easlea Way, Bury St. Edmunds

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- 015 Colne View Retail Park, Colchester
- 016 Copdock Retail Park, Copdock
- 017 Forest Retail Park, Thetford
- 018 Grafton Centre, Cambridge
- 019 Hardwick Retail Park, Kings Lynn
- 020 Lakeside Shopping Centre, West Thurrock
- 021 Meadow Centre, Stowmarket
- 022 Moreton Hall Retail Park, Bury St. Edmunds
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- 026 Shawlands Retail Park, Sudbury
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- 028 St. Nicholas Retail Park, Kings Lynn
- 029 Studlands/Fordham Retail Park, Newmarket
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- 031 The Mall Shopping Centre, Norwich
- 032 Thetford Retail Park, Thetford
- 033 Tollgate Centre, Colchester
- 034 Tower Ramparts, Ipswich

Town Centres:

- 035 Bedford
- 036 Braintree
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- 038 Bury St. Edmunds
- 039 Cambourne
- 040 Cambridge
- 041 Clare
- 042 Copdock
- 043 Downham Market
- 044 Ely
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- 046 Hunstanton
- 047 Ipswich
- 048 Isleham
- 049 King's Lynn
- 050 Mildenhall
- 051 Milton
- 052 Newmarket
- 053 Norwich
- 054 Peter District
- 055 RAF Base, Lakenheath
- 056 RAF Base, Mildenhall
- 057 Saffron Walden -
- 058 Soham
- 059 Stowmarket
- 060 Sudbury
- 061 Swaffham
- 062 Thetford
- 063 Wisbech

Others:

- 064 Catalogue / mail order
- 065 Internet (PLEASE WRITE IN)
- 066 Other (PLEASE WRITE IN)
- 067 (Don't know / can't remember)
- 068 (Do not do this shopping)

Q16 Where do you normally do most of your household's shopping for smaller goods for the home (such as small domestic electrical appliances like kettles / toasters / irons, glassware / tableware, and household textiles)
DO NOT READ OUT. ONE ANSWER ONLY
INTERVIEWERS PLEASE PROBE FULLY FOR A STORE NAME, ROAD, LOCATION (TOWN OR OUT OF CENTRE) AND TYPE RESPONSE UNDER 'OTHER'
IF 'OTHER' NOTE WHETHER TOWN CENTRE, RETAIL PARK OR STORE (including road name, location)
If internet, specify retailer under other, e.g 'Internet - Amazon'

Specific Stores:

- 001 B&Q, Risbygate Street, Bury St. Edmunds
- 002 DFS, Easlea Way, Bury St. Edmunds
- 003 Homebase, Ashdon Road, Saffron Walden
- 004 Homebase, Newmarket Road, Cambridge
- 005 Homebase, Oaks Drive, Newmarket
- 006 Homebase, Waldingfield Road/Northern Road, Sudbury
- 007 Matalan, Easlea Way, Bury St. Edmunds

Retail Parks / Shopping Centres:

- 008 Anglia Retail Park, Ipswich
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- 011 Cambridge Retail Park, Cambridge
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- 013 Chapelfield Shopping Centre, Norwich
- 014 Colchester Retail Park, Colchester
- 015 Colne View Retail Park, Colchester
- 016 Copdock Retail Park, Copdock
- 017 Forest Retail Park, Thetford
- 018 Grafton Centre, Cambridge
- 019 Hardwick Retail Park, Kings Lynn
- 020 Lakeside Shopping Centre, West Thurrock
- 021 Meadow Centre, Stowmarket
- 022 Moreton Hall Retail Park, Bury St. Edmunds
- 023 Pier Point Retail Park, Kings Lynn
- 024 Riverside Retail Park, Norwich
- 025 Robert Bobby Way Retail Park, Bury St. Edmunds
- 026 Shawlands Retail Park, Sudbury
- 027 St Edmundsbury Retail Park, Bury St. Edmunds
- 028 St. Nicholas Retail Park, Kings Lynn
- 029 Studlands/Fordham Retail Park, Newmarket
- 030 The Buttermarket, Ipswich
- 031 The Mall Shopping Centre, Norwich
- 032 Thetford Retail Park, Thetford
- 033 Tollgate Centre, Colchester
- 034 Tower Ramparts, Ipswich

Town Centres:

- 035 Bedford
- 036 Braintree
- 037 Brandon
- 038 Bury St. Edmunds
- 039 Cambourne
- 040 Cambridge
- 041 Clare
- 042 Copdock
- 043 Downham Market
- 044 Ely
- 045 Haverhill
- 046 Hunstanton
- 047 Ipswich
- 048 Isleham
- 049 King's Lynn
- 050 Mildenhall
- 051 Milton
- 052 Newmarket
- 053 Norwich
- 054 Peter District
- 055 RAF Base, Lakenheath
- 056 RAF Base, Mildenhall
- 057 Saffron Walden -
- 058 Soham
- 059 Stowmarket
- 060 Sudbury
- 061 Swaffham
- 062 Thetford
- 063 Wisbech

Others:

- 064 Catalogue / mail order
- 065 Internet (PLEASE WRITE IN)
- 066 Other (PLEASE WRITE IN)
- 067 (Don't know / can't remember)
- 068 (Do not do this shopping)

Q17 Where do you normally do most of your household's shopping for large domestic electrical appliances (such as fridges, washing machines, cookers, vacuum cleaners etc)?

DO NOT READ OUT. ONE ANSWER ONLY

INTERVIEWERS PLEASE PROBE FULLY FOR A STORE NAME, ROAD, LOCATION (TOWN OR OUT OF CENTRE) AND TYPE RESPONSE UNDER 'OTHER'

IF 'OTHER' NOTE WHETHER TOWN CENTRE, RETAIL PARK OR STORE (including road name, location)

If internet, specify retailer under other, e.g 'Internet - Amazon'

Specific Stores:

- 001 B&Q, Risbygate Street, Bury St. Edmunds
- 002 DFS, Easlea Way, Bury St. Edmunds
- 003 Homebase, Ashdon Road, Saffron Walden
- 004 Homebase, Newmarket Road, Cambridge
- 005 Homebase, Oaks Drive, Newmarket
- 006 Homebase, Waldingfield Road/Northern Road, Sudbury
- 007 Matalan, Easlea Way, Bury St. Edmunds

Retail Parks / Shopping Centres:

- 008 Anglia Retail Park, Ipswich
- 009 Beehive Centre, Cambridge
- 010 Braintree Retail Park, Braintree
- 011 Cambridge Retail Park, Cambridge
- 012 Cambridge Retail Park, Haverhill
- 013 Chapelfield Shopping Centre, Norwich
- 014 Colchester Retail Park, Colchester
- 015 Colne View Retail Park, Colchester
- 016 Copdock Retail Park, Copdock
- 017 Forest Retail Park, Thetford
- 018 Grafton Centre, Cambridge
- 019 Hardwick Retail Park, Kings Lynn
- 020 Lakeside Shopping Centre, West Thurrock
- 021 Meadow Centre, Stowmarket
- 022 Moreton Hall Retail Park, Bury St. Edmunds
- 023 Pier Point Retail Park, Kings Lynn
- 024 Riverside Retail Park, Norwich
- 025 Robert Bobby Way Retail Park, Bury St. Edmunds
- 026 Shawlands Retail Park, Sudbury
- 027 St Edmundsbury Retail Park, Bury St. Edmunds
- 028 St. Nicholas Retail Park, Kings Lynn
- 029 Studlands/Fordham Retail Park, Newmarket
- 030 The Buttermarket, Ipswich
- 031 The Mall Shopping Centre, Norwich
- 032 Thetford Retail Park, Thetford
- 033 Tollgate Centre, Colchester
- 034 Tower Ramparts, Ipswich

Town Centres:

- 035 Bedford
- 036 Braintree
- 037 Brandon
- 038 Bury St. Edmunds
- 039 Cambourne
- 040 Cambridge
- 041 Clare
- 042 Copdock
- 043 Downham Market
- 044 Ely
- 045 Haverhill
- 046 Hunstanton
- 047 Ipswich
- 048 Isleham
- 049 King's Lynn
- 050 Mildenhall
- 051 Milton
- 052 Newmarket
- 053 Norwich
- 054 Peter District
- 055 RAF Base, Lakenheath
- 056 RAF Base, Mildenhall
- 057 Saffron Walden -
- 058 Soham
- 059 Stowmarket
- 060 Sudbury
- 061 Swaffham
- 062 Thetford
- 063 Wisbech

Others:

- 064 Catalogue / mail order
- 065 Internet (PLEASE WRITE IN)
- 066 Other (PLEASE WRITE IN)
- 067 (Don't know / can't remember)
- 068 (Do not do this shopping)

Q18**Where do you do most of your household's shopping for pets & pet related products?**

DO NOT READ OUT. ONE ANSWER ONLY

INTERVIEWERS PLEASE PROBE FULLY FOR A STORE NAME, ROAD, LOCATION (TOWN OR OUT OF CENTRE) AND TYPE RESPONSE UNDER 'OTHER'

IF 'OTHER' NOTE WHETHER TOWN CENTRE, RETAIL PARK OR STORE (including road name, location)

If internet, specify retailer under other, e.g 'Internet - Amazon'

Specific Stores:

- 001 B&Q, Risbygate Street, Bury St. Edmunds
- 002 DFS, Easlea Way, Bury St. Edmunds
- 003 Homebase, Ashdon Road, Saffron Walden
- 004 Homebase, Newmarket Road, Cambridge
- 005 Homebase, Oaks Drive, Newmarket
- 006 Homebase, Waldingfield Road/Northern Road, Sudbury
- 007 Matalan, Easlea Way, Bury St. Edmunds

Retail Parks / Shopping Centres:

- 008 Anglia Retail Park, Ipswich
- 009 Beehive Centre, Cambridge
- 010 Braintree Retail Park, Braintree
- 011 Cambridge Retail Park, Cambridge
- 012 Cambridge Retail Park, Haverhill
- 013 Chapelfield Shopping Centre, Norwich
- 014 Colchester Retail Park, Colchester
- 015 Colne View Retail Park, Colchester
- 016 Copdock Retail Park, Copdock
- 017 Forest Retail Park, Thetford
- 018 Grafton Centre, Cambridge
- 019 Hardwick Retail Park, Kings Lynn
- 020 Lakeside Shopping Centre, West Thurrock
- 021 Meadow Centre, Stowmarket
- 022 Moreton Hall Retail Park, Bury St. Edmunds
- 023 Pier Point Retail Park, Kings Lynn
- 024 Riverside Retail Park, Norwich
- 025 Robert Bobby Way Retail Park, Bury St. Edmunds
- 026 Shawlands Retail Park, Sudbury
- 027 St Edmundsbury Retail Park, Bury St. Edmunds
- 028 St. Nicholas Retail Park, Kings Lynn
- 029 Studlands/Fordham Retail Park, Newmarket
- 030 The Buttermarket, Ipswich
- 031 The Mall Shopping Centre, Norwich
- 032 Thetford Retail Park, Thetford
- 033 Tollgate Centre, Colchester
- 034 Tower Ramparts, Ipswich

Town Centres:

- 035 Bedford
- 036 Braintree
- 037 Brandon
- 038 Bury St. Edmunds
- 039 Cambourne
- 040 Cambridge
- 041 Clare
- 042 Copdock
- 043 Downham Market
- 044 Ely
- 045 Haverhill
- 046 Hunstanton
- 047 Ipswich
- 048 Isleham
- 049 King's Lynn
- 050 Mildenhall
- 051 Milton
- 052 Newmarket
- 053 Norwich
- 054 Peter District
- 055 RAF Base, Lakenheath
- 056 RAF Base, Mildenhall
- 057 Saffron Walden -
- 058 Soham
- 059 Stowmarket
- 060 Sudbury
- 061 Swaffham
- 062 Thetford
- 063 Wisbech

Others:

- 064 Catalogue / mail order
- 065 Internet (PLEASE WRITE IN)
- 066 Other (PLEASE WRITE IN)
- 067 (Don't know / can't remember)
- 068 (Do not do this shopping)

Q19 Where do you do most of your household's shopping for all other non-food goods including games and toys, chemist goods; books; jewellery and watches; recreational and luxury goods?

DO NOT READ OUT. ONE ANSWER ONLY

Specific Stores:

- 001 B&Q, Risbygate Street, Bury St. Edmunds
- 002 DFS, Easlea Way, Bury St. Edmunds
- 003 Homebase, Ashdon Road, Saffron Walden
- 004 Homebase, Newmarket Road, Cambridge
- 005 Homebase, Oaks Drive, Newmarket
- 006 Homebase, Waldingfield Road/Northern Road, Sudbury
- 007 Matalan, Easlea Way, Bury St. Edmunds

Retail Parks / Shopping Centres:

- 008 Anglia Retail Park, Ipswich
- 009 Beehive Centre, Cambridge
- 010 Braintree Retail Park, Braintree
- 011 Cambridge Retail Park, Cambridge
- 012 Cambridge Retail Park, Haverhill
- 013 Chapelfield Shopping Centre, Norwich
- 014 Colchester Retail Park, Colchester
- 015 Colne View Retail Park, Colchester
- 016 Copdock Retail Park, Copdock
- 017 Forest Retail Park, Thetford
- 018 Grafton Centre, Cambridge
- 019 Hardwick Retail Park, Kings Lynn
- 020 Lakeside Shopping Centre, West Thurrock
- 021 Meadow Centre, Stowmarket
- 022 Moreton Hall Retail Park, Bury St. Edmunds
- 023 Pier Point Retail Park, Kings Lynn
- 024 Riverside Retail Park, Norwich
- 025 Robert Bobby Way Retail Park, Bury St. Edmunds
- 026 Shawlands Retail Park, Sudbury
- 027 St Edmundsbury Retail Park, Bury St. Edmunds
- 028 St. Nicholas Retail Park, Kings Lynn
- 029 Studlands/Fordham Retail Park, Newmarket
- 030 The Buttermarket, Ipswich
- 031 The Mall Shopping Centre, Norwich
- 032 Thetford Retail Park, Thetford
- 033 Tollgate Centre, Colchester
- 034 Tower Ramparts, Ipswich

Town Centres:

- 035 Bedford
- 036 Braintree
- 037 Brandon
- 038 Bury St. Edmunds
- 039 Cambourne
- 040 Cambridge
- 041 Clare
- 042 Copdock
- 043 Downham Market
- 044 Ely
- 045 Haverhill
- 046 Hunstanton
- 047 Ipswich
- 048 Isleham
- 049 King's Lynn
- 050 Mildenhall
- 051 Milton
- 052 Newmarket
- 053 Norwich
- 054 Peter District
- 055 RAF Base, Lakenheath
- 056 RAF Base, Mildenhall
- 057 Saffron Walden -
- 058 Soham
- 059 Stowmarket
- 060 Sudbury
- 061 Swaffham
- 062 Thetford
- 063 Wisbech

Others:

- 064 Catalogue / mail order
- 065 Internet (PLEASE WRITE IN)
- 066 Other (PLEASE WRITE IN)
- 067 (Don't know / can't remember)
- 068 (Do not do this shopping)

Q20 When you do your household's non-food shopping, how do you usually travel?
DO NOT READ OUT. ONE ANSWER ONLY

- 1 Car / van (as driver)
- 2 Car / van (as passenger)
- 3 Bus, minibus or coach
- 4 Using park & ride facility
- 5 Motorcycle, scooter or moped
- 6 Walk
- 7 Taxi
- 8 Train
- 9 Bicycle
- A Mobility scooter
- B Other (PLEASE WRITE IN)
- C Not applicable / goods delivered
- D (Don't know / varies)

Q21 How often do you and your family visit the following leisure attractions?
READ OUT. RECORD ALL THAT APPLY.

- | | |
|--|---|
| | More than once a week Once a week Once a fortnight Once a month Once every 2 months Once every 6 months Once a year Less often Don't do (Don't know / varies) |
| 1 Bingo | GOTO Q22 |
| 2 Casino | GOTO Q23 |
| 3 Gym / healthclub / swimming | GOTO Q24 |
| 4 Museum or place of historical interest | GOTO Q25 |
| 5 Nightclub / musical venue | GOTO Q26 |
| 6 Pub / bar | GOTO Q27 |
| 7 Restaurant | GOTO Q28 |
| 8 Tenpin bowling | GOTO Q29 |
| 9 Cinema | GOTO Q30 |
| A Theatre | GOTO Q31 |
| B Other Activity | GOTO Q32 |

Those who visit for Bingo at Q21

Q22 Where do you or members of your household normally go to play bingo?

DO NOT READ OUT. ONE ANSWER ONLY

If OTHER or RESPONDENTS STATES A PARTICULAR FACILITY, please specify the NAME, RETAIL PARK / ROAD NAME AND AREA

- 001 Breckland Bingo, London Road, Brandon
- 002 Go Crazy Bingo, Thetford Road, Brandon
- 003 Winners Bingo, 4 Hatters Street, Bury St Edmunds
- 004 Gala Bingo, 21 Hobson Street, Cambridge
- 005 Winners Bingo & Social Club, Guidhall Street, Thetford
- 006 Gala Bingo, 48 Osborne Street, Colchester
- 007 Balsham
- 008 Barrow
- 009 Brandon
- 010 Bury St Edmunds
- 011 Cambridge
- 012 Chelmsford
- 013 Colchester
- 014 Diss
- 015 Downham Market
- 016 Ely
- 017 Felixstowe
- 018 Haverhill
- 019 Hitcham
- 020 Ipswich Cardinal Park
- 021 Ipswich Town Centre
- 022 Ipswich Waterfront
- 023 King's Lynn
- 024 Lakenheath
- 025 Littleport
- 026 Mildenhall
- 027 Newmarket
- 028 Norwich
- 029 Peterborough
- 030 Saffron Walden
- 031 Soham
- 032 Stowmarket
- 033 Sudbury
- 034 Swaffham
- 035 Thetford
- 036 Woodbridge
- 037 Other (PLEASE WRITE IN)
- 038 (Don't know)

Those who visit a casino at Q21

Q23 Where do you or members of your household normally go to the casino?

DO NOT READ OUT. ONE ANSWER ONLY

If OTHER or RESPONDENTS STATES A PARTICULAR FACILITY, please specify the
NAME, RETAIL PARK / ROAD NAME AND AREA

- 001 Balsham
- 002 Barrow
- 003 Brandon
- 004 Bury St Edmunds
- 005 Cambridge
- 006 Chelmsford
- 007 Colchester
- 008 Diss
- 009 Downham Market
- 010 Ely
- 011 Felixstowe
- 012 Haverhill
- 013 Hitcham
- 014 Ipswich Cardinal Park
- 015 Ipswich Town Centre
- 016 Ipswich Waterfront
- 017 King's Lynn
- 018 Lakenheath
- 019 Littleport
- 020 Mildenhall
- 021 Newmarket
- 022 Norwich
- 023 Peterborough
- 024 Saffron Walden
- 025 Soham
- 026 Stowmarket
- 027 Sudbury
- 028 Swaffham
- 029 Thetford
- 030 Woodbridge
- 031 Other (PLEASE WRITE IN)
- 032 (Don't know / varies)

Those who visit a gym / healthclub at Q21

Q24 Where do you or members of your household normally go to a gym / healthclub?

DO NOT READ OUT. ONE ANSWER ONLY

If OTHER or RESPONDENTS STATES A PARTICULAR FACILITY, please specify the
NAME, RETAIL PARK / ROAD NAME AND AREA

- 001 Abbeycroft Leisure Centre (Bury St. Edmunds), Beetons way, Bury St Edmunds
- 002 Abbeycroft Leisure Centre (Haverhill), Lord's Croft Lane, Haverhill
- 003 Altrium Club, Newham Street, Ely
- 004 Bedford Lodge, Bury Road, Newmarket
- 005 Brandon Leisure Centre, High Street, Brandon
- 006 Breckland Leisure & Waterworld, Croxton Road, Thetford
- 007 Cambridge - Other, Cambridge
- 008 Community Sports Centre, Linton, Cambridge
- 009 Dome Leisure Centre, Bury Road, Mildenhall
- 010 Downham Market Sports Centre, Bexwell Road, Downham Market
- 011 Ely Gym, Broad Street, Ely
- 012 Fitness First, Station Hill, Bury St Edmunds
- 013 Fitta Bodies Gymnasium, Thingoe Hill, Bury St Edmunds
- 014 LA Fitness, Easlea Road, Bury St Edmunds
- 015 Moreton Hall Health Club, Mount Road, Bury St Edmunds
- 016 Newmarket Leisure Centre, Newmarket
- 017 Paradise Sports Centre, Newham Street, Ely
- 018 Perfect U, Victoria Way, Newmarket
- 019 RAF Base Lakenheath, Lakenheath
- 020 RAF Base Mildenhall, Mildenhall
- 021 Red Lodge Sports Pavilion, Hundred Acre Way, Red Lodge
- 022 Sudbury Sports Centre, Tudor Road, Sudbury
- 023 Balsham
- 024 Barrow
- 025 Brandon
- 026 Bury St Edmunds
- 027 Cambridge
- 028 Chelmsford
- 029 Colchester
- 030 Diss
- 031 Downham Market
- 032 Ely
- 033 Felixstowe
- 034 Haverhill
- 035 Hitcham
- 036 Ipswich Cardinal Park
- 037 Ipswich Town Centre
- 038 Ipswich Waterfront
- 039 King's Lynn
- 040 Lakenheath
- 041 Littleport
- 042 Mildenhall
- 043 Newmarket
- 044 Norwich
- 045 Peterborough
- 046 Saffron Walden
- 047 Soham
- 048 Stowmarket
- 049 Sudbury
- 050 Swaffham
- 051 Thetford
- 052 Woodbridge
- 053 Other (PLEASE WRITE IN)
- 054 (Don't know / varies)

Those who visit a museum or place of historical interest at Q21

Q25 Where do you or members of your household normally go to a museum or place of historical interest?

DO NOT READ OUT. ONE ANSWER ONLY

If OTHER or RESPONDENTS STATES A PARTICULAR FACILITY, please specify the NAME, RETAIL PARK / ROAD NAME AND AREA

- 001 Ancient Museum of Thetford, Thetford
- 002 Angelsey Abbey, Lode
- 003 Cressing Temple, Braintree
- 004 Dads Army Museum, Thetford
- 005 Fitzwilliam Museum, Cambridge
- 006 Grimes Graves, Thetford
- 007 Mildenhall Museum, King Street, Mildenhall
- 008 Museum of East Anglian Life, Crowe Street , Stowmarket
- 009 Museum of Science and Technology, Cambridge
- 010 National Horseracing Museum, Newmarket
- 011 Norwich Castle Museum and Gallery, Norwich
- 012 St Edmundsbury Cathedral, Bury St Edmunds
- 013 Balsham
- 014 Barrow
- 015 Brandon
- 016 Bury St Edmunds
- 017 Cambridge
- 018 Chelmsford
- 019 Colchester
- 020 Diss
- 021 Downham Market
- 022 Ely
- 023 Felixstowe
- 024 Haverhill
- 025 Hitcham
- 026 Ipswich Cardinal Park
- 027 Ipswich Town Centre
- 028 Ipswich Waterfront
- 029 King's Lynn
- 030 Lakenheath
- 031 Littleport
- 032 Mildenhall
- 033 Newmarket
- 034 Norwich
- 035 Peterborough
- 036 Saffron Walden
- 037 Soham
- 038 Stowmarket
- 039 Sudbury
- 040 Swaffham
- 041 Thetford
- 042 Woodbridge
- 043 Other (PLEASE WRITE IN)
- 044 (Don't know / varies)

Those who visit a nightclub or musical venue at Q21

Q26 Where do you or members of your household normally go to a nightclub or musical venue?

DO NOT READ OUT. ONE ANSWER ONLY

If OTHER or RESPONDENTS STATES A PARTICULAR FACILITY, please specify the NAME, RETAIL PARK / ROAD NAME AND AREA

- 001 Millionaire's Bar, 146 High Street, Newmarket
- 002 Pacino's Bar, Newmarket
- 003 De Niro's Nightclub, Grovesnor Sq, Newmarket
- 004 Innocence, 109 High Street, Newmarket
- 005 The Bull, 62 High Street, Newmarket
- 006 The Flintknappers, Market Hill, Brandon
- 007 The Half Moon, 103 Kingsway, Mildenhall
- 008 Brook Theatre, Soham
- 009 Balsham
- 010 Barrow
- 011 Brandon
- 012 Bury St Edmunds
- 013 Cambridge
- 014 Chelmsford
- 015 Colchester
- 016 Diss
- 017 Downham Market
- 018 Ely
- 019 Felixstowe
- 020 Haverhill
- 021 Hitcham
- 022 Ipswich Cardinal Park
- 023 Ipswich Town Centre
- 024 Ipswich Waterfront
- 025 King's Lynn
- 026 Lakenheath
- 027 Littleport
- 028 Mildenhall
- 029 Newmarket
- 030 Norwich
- 031 Peterborough
- 032 Saffron Walden
- 033 Soham
- 034 Stowmarket
- 035 Sudbury
- 036 Swaffham
- 037 Thetford
- 038 Woodbridge
- 039 Other (PLEASE WRITE IN)
- 040 (Don't know / varies)

Those who visit a pub / bar at Q21

Q27 Where do you or members of your household normally go to a pub / bar?

DO NOT READ OUT. ONE ANSWER ONLY

If OTHER or RESPONDENTS STATES A PARTICULAR FACILITY, please specify the NAME, RETAIL PARK / ROAD NAME AND AREA

- 001 Balsham
- 002 Barrow
- 003 Brandon
- 004 Bury St Edmunds
- 005 Cambridge
- 006 Chelmsford
- 007 Colchester
- 008 Diss
- 009 Downham Market
- 010 Ely
- 011 Felixstowe
- 012 Haverhill
- 013 Hitcham
- 014 Ipswich Cardinal Park
- 015 Ipswich Town Centre
- 016 Ipswich Waterfront
- 017 King's Lynn
- 018 Lakenheath
- 019 Littleport
- 020 Mildenhall
- 021 Newmarket
- 022 Norwich
- 023 Peterborough
- 024 Saffron Walden
- 025 Soham
- 026 Stowmarket
- 027 Sudbury
- 028 Swaffham
- 029 Thetford
- 030 Woodbridge
- 031 Other (PLEASE WRITE IN)
- 032 (Don't know / varies)

Those who visit a restaurant at Q21

Q28 Where do you or members of your household normally go to a restaurant?

DO NOT READ OUT. ONE ANSWER ONLY

If OTHER or RESPONDENTS STATES A PARTICULAR FACILITY, please specify the NAME, RETAIL PARK / ROAD NAME AND AREA

- 001 Balsham
- 002 Barrow
- 003 Brandon
- 004 Bury St Edmunds
- 005 Cambridge
- 006 Chelmsford
- 007 Colchester
- 008 Diss
- 009 Downham Market
- 010 Ely
- 011 Felixstowe
- 012 Haverhill
- 013 Hitcham
- 014 Ipswich Cardinal Park
- 015 Ipswich Town Centre
- 016 Ipswich Waterfront
- 017 King's Lynn
- 018 Lakenheath
- 019 Littleport
- 020 Mildenhall
- 021 Newmarket
- 022 Norwich
- 023 Peterborough
- 024 Saffron Walden
- 025 Soham
- 026 Stowmarket
- 027 Sudbury
- 028 Swaffham
- 029 Thetford
- 030 Woodbridge
- 031 Other (PLEASE WRITE IN)
- 032 (Don't know / varies)

Those who go tenpin bowling at Q21

Q29 Where do you or members of your household normally go tenpin bowling?

DO NOT READ OUT. ONE ANSWER ONLY

If OTHER or RESPONDENTS STATES A PARTICULAR FACILITY, please specify the NAME, RETAIL PARK / ROAD NAME AND AREA

- 001 Bowling Centre, Riverside, Norwich
- 002 Bury Bowl, Eastgate Street, Bury St Edmunds
- 003 Haverhill Snooker and Bowl, Chalkstone Way, Haverhill
- 004 Hollywood Bowl, Wherry Road, Norwich
- 005 Mega Bowl, Pilsworth, Bury St Edmunds
- 006 Megabowl, Clifton Way, Cambridge
- 007 Megabowl, Cowdray Avenue , Colchester
- 008 Mr G's Bowling Centre, Market Hill, Brandon
- 009 Newmarket Snooker and Bowl, All Saints Road, Newmarket
- 010 RAF Base Lakenheath, , Lakenheath
- 011 RAF Base Mildenhall, , Mildenhall
- 012 Strikes Bowl Multiplex, Lynn Road, Kings Lynn
- 013 Strikes Bowling Centre, The Dock, Ely
- 014 Sudbury Bowl (Strikes)
- 015 Tenpin, Cambridge Leisure Park, Cambridge
- 016 Balsham
- 017 Barrow
- 018 Brandon
- 019 Bury St Edmunds
- 020 Cambridge
- 021 Chelmsford
- 022 Colchester
- 023 Diss
- 024 Downham Market
- 025 Ely
- 026 Felixstowe
- 027 Haverhill
- 028 Hitcham
- 029 Ipswich Cardinal Park
- 030 Ipswich Town Centre
- 031 Ipswich Waterfront
- 032 King's Lynn
- 033 Lakenheath
- 034 Littleport
- 035 Mildenhall
- 036 Newmarket
- 037 Norwich
- 038 Peterborough
- 039 Saffron Walden
- 040 Soham
- 041 Stowmarket
- 042 Sudbury
- 043 Swaffham
- 044 Thetford
- 045 Woodbridge
- 046 Other (PLEASE WRITE IN)
- 047 (Don't know / varies)

Those who go to the cinema at Q21

Q30 Where do you or members of your household normally go to the cinema?

DO NOT READ OUT. ONE ANSWER ONLY

If OTHER or RESPONDENTS STATES A PARTICULAR FACILITY, please specify the
NAME, RETAIL PARK / ROAD NAME AND AREA

- 001 ADEC Cinema (The Maltings), Waterside, Ely
- 002 Arts Picturehouse, Cambridge
- 003 Cineworld (formerly UGC), Ipswich
- 004 Cineworld, Clifton Leisure Park, Cambridge
- 005 Cineworld, Freeport Village, Braintree
- 006 Cineworld, Haverhill
- 007 Cineworld, Huntingdon
- 008 Cineworld, Parkway, Bury St Edmunds
- 009 Haverhill Arts Centre, Haverhill
- 010 Hollywood Screen, Bury St Edmunds
- 011 Hollywood Screen, Daresbury
- 012 Majestic, Kings Lynn
- 013 Odeon Cinema, Hatter Street, Bury St Edmunds
- 014 Odeon Cinema, Head Street, Colchester
- 015 Odeon, Wherry Road, Norwich
- 016 RAF Base Lakenheath, Lakenheath
- 017 RAF Base Mildenhall, Mildenhall
- 018 Showcase, Peterborough
- 019 The Regal, Stowmarket
- 020 UCI, Wherry Road, Norwich
- 021 Vue, Theatre Grafton Centre, Cambridge
- 022 Balsham
- 023 Barrow
- 024 Brandon
- 025 Bury St Edmunds
- 026 Cambridge
- 027 Chelmsford
- 028 Colchester
- 029 Diss
- 030 Downham Market
- 031 Ely
- 032 Felixstowe
- 033 Haverhill
- 034 Hitcham
- 035 Ipswich Cardinal Park
- 036 Ipswich Town Centre
- 037 Ipswich Waterfront
- 038 King's Lynn
- 039 Lakenheath
- 040 Littleport
- 041 Mildenhall
- 042 Newmarket
- 043 Norwich
- 044 Peterborough
- 045 Saffron Walden
- 046 Soham
- 047 Stowmarket
- 048 Sudbury
- 049 Swaffham
- 050 Thetford
- 051 Woodbridge
- 052 Other (PLEASE WRITE IN)
- 053 (Don't know / varies)

Those who go to the theatre at Q21

Q31 Where do you or members of your household normally go to the theatre?

DO NOT READ OUT. ONE ANSWER ONLY

If OTHER or RESPONDENTS STATES A PARTICULAR FACILITY, please specify the
NAME, RETAIL PARK / ROAD NAME AND AREA

- 001 ADC Theatre, Park Street, Cambridge
- 002 Cambridge Arts Theatre, 6 St Edward's Passage, Cambridge
- 003 Cambridge Corn Exchange, Wheeler Street, Cambridge
- 004 Ipswich Regent Theatre & Corn Exchange, 3 St. Helen Street, Ipswich
- 005 Kings Theatre, 16 Fitzroy Street, Newmarket
- 006 London (West End)
- 007 Maddermarket Theatre, , Norwich
- 008 Mercury Theatre, Colchester
- 009 Mumford Theatre, East Road, Cambridge
- 010 Regal Theatre, Stowmarket
- 011 The Junction, Cattle Market, Cambridge
- 012 The Quay Theatre, Sudbury
- 013 The Theatre Royal, Bury St Edmunds
- 014 Theatre Royal, Norwich
- 015 Balsham
- 016 Barrow
- 017 Brandon
- 018 Bury St Edmunds
- 019 Cambridge
- 020 Chelmsford
- 021 Colchester
- 022 Diss
- 023 Downham Market
- 024 Ely
- 025 Felixstowe
- 026 Haverhill
- 027 Hitcham
- 028 Ipswich Cardinal Park
- 029 Ipswich Town Centre
- 030 Ipswich Waterfront
- 031 King's Lynn
- 032 Lakenheath
- 033 Littleport
- 034 Mildenhall
- 035 Newmarket
- 036 Norwich
- 037 Peterborough
- 038 Saffron Walden
- 039 Soham
- 040 Stowmarket
- 041 Sudbury
- 042 Swaffham
- 043 Thetford
- 044 Woodbridge
- 045 Other (PLEASE WRITE IN)
- 046 (Don't know / varies)

Those who do other activities at Q21

Q32 Where do you or members of your household normally go for other activities?

DO NOT READ OUT. ONE ANSWER ONLY

Please specify the NAME, RETAIL PARK / ROAD NAME AND AREA

- 001 Balsham
- 002 Barrow
- 003 Brandon
- 004 Bury St Edmunds
- 005 Cambridge
- 006 Chelmsford
- 007 Colchester
- 008 Diss
- 009 Downham Market
- 010 Ely
- 011 Felixstowe
- 012 Haverhill
- 013 Hitcham
- 014 Ipswich Cardinal Park
- 015 Ipswich Town Centre
- 016 Ipswich Waterfront
- 017 King's Lynn
- 018 Lakenheath
- 019 Littleport
- 020 Mildenhall
- 021 Newmarket
- 022 Norwich
- 023 Peterborough
- 024 Saffron Walden
- 025 Soham
- 026 Stowmarket
- 027 Sudbury
- 028 Swaffham
- 029 Thetford
- 030 Woodbridge
- 031 Other (PLEASE WRITE IN)
- 032 (Don't know / varies)

Those who do other activities at Q21

Q32A And what was this activity?

PROBE FULLY.

1

Q33 What improvements to Newmarket Town Centre, if any, would make you visit it more often than you currently do?

DO NOT READ OUT. CAN BE MULTICODED. RECORD UP TO THREE RESPONSES ONLY.

- 1 Better disabled access
- 2 Better public transport
- 3 Better signposting
- 4 Better policing / safer
- 5 Better value for money / lower prices
- 6 Cinema
- 7 Cleaner streets
- 8 Department Store
- 9 Fewer traffic free pedestrian streets
- A Improved public transport
- B More frequent or different routes
- C Cheaper public transport
- D Additional park & ride facilities
- E Cheaper park & ride facilities
- F Larger shops
- G New shopping centre
- H Large food superstore
- I More / better boutique shop offer
- J More / better higher quality shop offer
- K Shops and services open later in the evening
- L Lower car parking charges
- M More / better car parking
- N More / better foodstores
- O More fashion shops
- P More smaller independent & specialist shops
- Q More traffic free pedestrianised streets
- R More / better cafés
- S More / better cultural facilities
- T More / better entertainment facilities
- U More / better events
- V More better parks / green spaces
- W More / better public houses
- X More / better restaurants
- Y More / better seats
- Z More/better range of multiple retailers
- a Nothing
- b Other (PLEASE WRITE IN)
- c (Don't know)
- d (Do not visit Newmarket)

Q34 What improvements to Mildenhall Town Centre, if any, would make you visit it more often than you currently do?

DO NOT READ OUT. CAN BE MULTICODED. RECORD UP TO THREE RESPONSES ONLY.

- 1 Better disabled access
- 2 Better public transport
- 3 Better signposting
- 4 Better policing / safer
- 5 Better value for money / lower prices
- 6 Cinema
- 7 Cleaner streets
- 8 Department Store
- 9 Fewer traffic free pedestrian streets
- A Improved public transport
- B More frequent or different routes
- C Cheaper public transport
- D Additional park & ride facilities
- E Cheaper park & ride facilities
- F Larger shops
- G New shopping centre
- H Large food superstore
- I More / better boutique shop offer
- J More / better higher quality shop offer
- K Shops and services open later in the evening
- L Lower car parking charges
- M More / better car parking
- N More / better foodstores
- O More fashion shops
- P More smaller independent & specialist shops
- Q More traffic free pedestrianised streets
- R More / better cafés
- S More / better cultural facilities
- T More / better entertainment facilities
- U More / better events'
- V More better parks / green spaces
- W More / better public houses
- X More / better restaurants
- Y More / better seats
- Z More/ better range of multiple retailers
- a Nothing
- b Other (PLEASE WRITE IN)
- c (Don't know)
- d (Do not visit Mildenhall)

Q35 What improvements to Brandon Town Centre, if any, would make you visit it more often than you currently do?

DO NOT READ OUT. CAN BE MULTICODED UP TO MARK UP TO THREE RESPONSES ONLY.

- 1 Additional park & ride facilities
- 2 Better disabled access
- 3 Better policing / safer
- 4 Better public transport
- 5 Better signposting
- 6 Better value for money / lower prices
- 7 Cheaper park & ride facilities
- 8 Cheaper public transport
- 9 Cinema
- A Cleaner streets
- B Department Store
- C Fewer traffic free pedestrian streets
- D Improved public transport
- E Large food superstore
- F Larger shops
- G Lower car parking charges
- H More / better boutique shop offer
- I More / better car parking
- J More / better foodstores
- K More / better higher quality shop offer
- L More better parks / green spaces
- M More fashion shops
- N More frequent or different routes
- O More smaller independent & specialist shops
- P More traffic free pedestrianised streets
- Q More/ better range of multiple retailers
- R More / better cafés
- S More / better cultural facilities
- T More / better entertainment facilities
- U More / better events'
- V More / better public houses
- W More / better restaurants
- X More / better seats
- Y New shopping centre
- Z Shops and services open later in the evening
- a Nothing
- b Other (PLEASE WRITE IN)
- c (Don't know)
- d (Do not visit Brandon for leisure activities)

Demographics: Please READ OUT Statement:

Finally, I would like to ask you a few questions about yourself and your household. These are for survey control purposes only and the results will not be released identifying you by name.

GEN Gender of respondent

DO NOT READ OUT. CODE FROM OBSERVATION

- 1 Male
- 2 Female

AGE Can I just ask, how old are you?

DO NOT READ OUT. ONE ANSWER ONLY

- 1 18-24
- 2 25-34
- 3 35-44
- 4 45-54
- 5 55-64
- 6 65+
- 7 (Refused)

OCC What is the occupation of the chief wage earner of the household?

DO NOT READ OUT. ONE ANSWER ONLY

- 1 Occupation (PLEASE WRITE IN)
- 2 Basic state pension ONLY
- 3 (Refused)

WOR If you are in employment, where do you work?

DO NOT READ OUT. ONE ANSWER ONLY

- 1 Braintree
- 2 Brandon
- 3 Bury St. Edmunds
- 4 Cambridge
- 5 Colchester
- 6 Ely
- 7 Haverhill
- 8 Ipswich
- 9 King's Lynn
- A Lakenheath
- B Mildenhall
- C Newmarket
- D Norwich
- E Stowmarket
- F Sudbury
- G Thetford
- H Wisbech
- I Other (PLEASE WRITE IN)
- J (Don't know / can't remember)
- K (Not in employment)

ADU How many adults aged 16 years and over, including yourself, live in your household?

DO NOT READ OUT. ONE ANSWER ONLY

- 1 One
- 2 Two
- 3 Three
- 4 Four or more
- 5 (Refused)

CHI How many children aged 15 years and under, live in your household?

DO NOT READ OUT. ONE ANSWER ONLY

- 1 None
- 2 One
- 3 Two
- 4 Three
- 5 Four or more
- 6 (Refused)

CAR How many cars does your household own or have the use of?

DO NOT READ OUT. ONE ANSWER ONLY

- 1 None
- 2 One
- 3 Two
- 4 Three or more
- 5 (Refused)

RAF Are you or any members of your immediate family military personnel on RAF Mildenhall or RAF Lakenheath?

- 1 Yes
- 2 No
- 3 (Refused)

Thank & close

INTRODUCTION: Good morning / afternoon, I am from **NEMS** market research, an independent market research company. I am conducting some research on behalf of Forest Heath District Council investigating what people think of [STUDY CENTRE]. Do you have a few minutes to spare to answer some questions?

ASK ALL:

Q.A Could you tell me your **HOME POSTCODE** please, not your holiday address if you are on holiday?

INTERVIEWER, PLEASE WRITE CLEARLY AND IN CAPITALS If unknown, please record street, town or district.

Home Postcode: Street/Town/District: _____ (1)

IF REFUSED, THANK AND CLOSEASK ALL:

Q.1 What is the **main** purpose of your visit to [STUDY CENTRE] today?

DO NOT PROMPT ONE ANSWER ONLY.

ASK ALL:

Q.2 What else will you be doing here today as part of your trip?

CAN BE MULTICODED PROBE FULLY. What else?

	Q.1 (2)	Q.2 (3)	
Main bulky (trolley) food shopping (in shops)	1	1	GO TO Q.3
Top-up smaller (basket) food shopping (in shops)	2	2	GO TO Q.3
Market (shopping)	3	3	GO TO Q.3
Non-food shopping (in shops)	4	4	GO TO Q.3
Using financial services, e.g. banks, building society	5	5	GO TO Q.5
Using other services e.g. hairdressers, travel agents, launderette	6	6	GO TO Q.5
Visiting restaurant, cafe, or public house	7	7	GO TO Q.5
Work in or near the town centre	8	8	GO TO Q.5
Visiting the library	9	9	GO TO Q.5
Visiting gym or sports centre	A	A	GO TO Q.5
Visiting a place of worship	B	B	GO TO Q.5
Museum	C	C	GO TO Q.5
Nightlife (pub/bar/nightclub)	D	D	GO TO Q.5
Meeting friends or family	E	E	GO TO Q.5
Visiting the community centre	F	F	GO TO Q.5
Visiting Mildenhall Social Club (Mildenhall only)	G	G	GO TO Q.5
Visiting District Council Offices (Mildenhall only)	H	H	GO TO Q.5
Visiting the swimming pool (Mildenhall only)	I	I	GO TO Q.5
Other social or leisure reasons	J	J	GO TO Q.5
Business/place of work	K	K	GO TO Q.5
Education/study	L	L	GO TO Q.5
Visiting betting shop	M	M	GO TO Q.5
Watching horse racing (Newmarket only)	N	N	GO TO Q.5
Participating in horse racing (Newmarket only)	O	O	GO TO Q.5
Ten Pin Bowling (Brandon only)	P	P	GO TO Q.5
Access to transport services (i.e. en route to somewhere else)	Q	Q	GO TO Q.5
Using health services, (e.g. doctor, dentist, optician, hospital)	R	R	GO TO Q.5
Browsing/window shopping	S	S	GO TO Q.5
Tourism/sightseeing (on holiday)	T	T	GO TO Q.5
Tourism/sightseeing (on a day trip)	U	U	GO TO Q.5
Other (PLEASE WRITE IN)	V	V	GO TO Q.5
<hr/>			
(No main purpose/No other purpose)	W	W	GO TO Q.5
(Don't know)	X	X	GO TO Q.5

ASK IF SHOPPING (ANY) AT Q.1 OR Q.2, OTHERS GO TO Q5: SHOWCARD 'A'

Q.3 What is the MAIN type of shopping you intend to do here today?

DO NOT PROMPT ONE ANSWER ONLY.

	(4)
Bulky (Trolley) food and groceries	1
Top up (basket) food and groceries	2
Both food and non-food items	3
Alcohol / Liquor	4
Audio / visual equipment / electronic goods	5
Books / Papers / Magazines	6
Chemist goods	7
Clothing / Footwear items	8
Cosmetics & Perfumes	9
DIY / Household goods	A
Furniture / Carpets / Textiles	B
Hardware / gardening	C
Household linen / fabrics	D
Larger electrical goods e.g. washing machines, fridge, etc	E
Recreational / Leisure goods	F
Returning goods	G
Shopping for 'other' goods	H
Sit down meal / snack (i.e. foodcourt, café/restaurant)	I
Small electrical goods e.g. TV, kettle, toaster, etc	J
Take away food and pre-prepared meals	K
Other (PLEASE WRITE IN)	L
<hr/>	
(No MAIN type of shopping)	M

ASK IF SHOPPING (ANY) AT Q.1 OR Q.2, OTHERS GO TO Q.5: SHOWCARD 'B'

Q.4 Which MAIN store(s) have you / do you intend to visit today?

CAN BE MULTI-CODED PROBE FULLY Which others?

	(5)
NEWMARKET	
Iceland, Newmarket	1
Marks & Spencer, Newmarket	2
Store Twenty One, Newmarket	3
Tesco, Newmarket	4
Waitrose, Newmarket	5
TK Maxx, Newmarket	6
BRANDON	
Tesco, Brandon	7
Aldi, Brandon	8
MILDENHALL	
Sainsbury's, Mildenhall	9
Mildenhall (Friday) Market	A
No main store – collection of several	B
Other (PLEASE WRITE IN)	C
<hr/>	
(Don't know)	D

ASK ALL:

Q.5 How long was your journey to [STUDY CENTRE]?

DO NOT PROMPT ONE ANSWER ONLY.

	(6)
0- 5 minutes	1
6-10 minutes	2
11-20 minutes	3
21-30 minutes	4
31-60 minutes	5
61 minutes - 2 hours	6
Over 2 hours	7
(Don't know / Can't remember)	8

ASK ALL:

- Q.6 How did you travel to [STUDY CENTRE] today (main part of journey) ?
DO NOT PROMPT ONE ANSWER ONLY.

	(7)	
Car / van (as driver)	1	GO TO Q.7
Car / van (as passenger)	2	GO TO Q.7
Bus, minibus or coach	3	GO TO Q.8
Motorcycle, scooter or moped	4	GO TO Q.7
Walk	5	GO TO Q.8
Taxi / minicab	6	GO TO Q.8
Train	7	GO TO Q.8
Bicycle	8	GO TO Q.8
Park and Ride	9	GO TO Q.8
Other (PLEASE WRITE IN)	A	GO TO Q.8

ASK THOSE WHO 'ARRIVED BY CAR, MOTORCYCLE OR MOPED' AT Q.6, OTHERS GO TO Q.8:
SHOWCARD 'C'

- Q.7 Where did you park today ? If unknown, probe for as much information as possible, such as street, landmark etc.
ONE ANSWER ONLY. DO NOT PROMPT

	(8)	
NEWMARKET		
Rous Road Pay and Display	1	
Market Square Pay and Display	2	
Guineas Multi Story Car Park	3	
All Saints Road/Grosvenor Yard Long Stay Car Park	4	
Newmarket Race Course	5	
Waitrose, Newmarket	6	
BRANDON	(9)	
Bury Road, long stay car park	1	
George Street, long stay car park	2	
Aldi, Brandon	3	
Tesco, Brandon	4	
MILDENHALL	(10)	
Centre Yard, Police Station Square	1	
Recreation Way, long stay car park	2	
Sainsbury's, Recreation Way	3	
OTHER	(11)	
On street (PLEASE WRITE IN)	1	
Other (PLEASE RECORD CAR PARK + TOWN)	2	
(Dropped off – didn't park)	3	
(Don't know / can't remember)	4	
(Refused)	5	

ASK ALL

- Q.8 On average, how often do you visit [STUDY CENTRE]?
DO NOT PROMPT ONE ANSWER ONLY.

	(12)	
Everyday	1	
5 times a week	2	
4 times a week	3	
3 times a week	4	
Twice a week	5	
Once a week	6	
Once every two weeks	7	
Once a month	8	
Once every 2-3 months	9	
Once every six months	A	
Once a year	B	
First time visit	C	
(Don't know / varies)	D	

ASK ALL:

- Q.9 Overall, approximately how much TIME do you expect to spend shopping here today?
DO NOT PROMPT. ONE ANSWER ONLY

Exact Time	<input type="text"/>	(13)	(14)
		0 – 15 minutes	1
		16 – 30 minutes	2
		<u>31 – 60 minutes</u>	<u>3</u>
		Over 1 – 1.5 hours	4
		Over 1.5 – 2 hours	5
		<u>Over 2 – 3 hours</u>	<u>6</u>
		Over 3 hours	7
		Just passing through / not shopping	8
		(Refused)	9

ASK ALL:

- Q.10 Approximately how much (total) do you expect to spend on food in the town centre today (excluding food and drink bought in cafes and restaurants, etc)?

WRITE IN ANSWER TO THE NEAREST POUND

(15)

£

Nothing A

(Don't know) B

(Refused) C

ASK ALL:

- Q.11 Approximately how much (total) do you expect to spend on non-food goods in the town centre today?

WRITE IN ANSWER TO THE NEAREST POUND

(16)

£

Nothing A

(Don't know) B

(Refused) C

ASK ALL:

- Q.12 What do you like about [STUDY CENTRE] for shopping or services?
DO NOT PROMPT. CODE UPTO 3 RESPONSES ONLY PROBE FULLY. What else?

(17)

Good food shops 1

Good non-food shops 2

Good value for money in the shops / low prices 3

Good range of financial or personal services 4

Good cafes, restaurants or public houses 5

Good market 6

Complementary leisure activities 7

Attractive environment / nice place 8

Proximity to racecourse 9

Historic buildings A

Clean streets B

Well maintained streets C

Easy to park the car D

Good public transport E

Easy to get to from home F

Easy to get to from work G

Good safety / security H

Particular shops or services (PLEASE WRITE IN) I

Nothing / very little J

Other (PLEASE WRITE IN) K

(Don't know) L

ASK ALL:

- Q.13 What do you dislike about [STUDY CENTRE] for shopping or services?
DO NOT PROMPT. CODE UPTO 3 RESPONSES ONLY PROBE FULLY. What else?

	(18)
Too busy / crowded	1
Poor range of shops	2
Expensive food shops	3
Poor range of services	4
Insufficient parking	5
High levels of traffic through centre	6
Traffic congestion makes it difficult to get to by car	7
Poor value for money in the shops / high prices	8
Danger from vehicles in some streets/not fully pedestrianised	9
Difficult to park near shops	A
Car parking too expensive	B
Streets dirty	C
Streets badly maintained	D
Unattractive environment/not a very nice place	E
Not enough seats / litter bins /public telephones /public toilets	F
Poor access for the disabled	G
Particular shops or services (PLEASE WRITE IN)	H
Nothing / very little	I
Other (PLEASE WRITE IN)	J
(Don't know)	K

ASK ALL:

- Q.14 What improvements, if any, would make you shop or use services in [STUDY CENTRE] more often?
DO NOT PROMPT. CODE UPTO 3 RESPONSES ONLY PROBE FULLY. What else?

	(19)
More / better car parking	1
Better public transport	2
More / better shops (PLEASE WRITE IN)	3
More/better financial or personal services (PLEASE WRITE IN)	4
More /better cafes, restaurants or public houses (PLEASE WRITE IN)	5
More/better leisure, entertainment or cultural facilities (PLEASE WRITE IN)	6
A particular shop (PLEASE WRITE IN)	7
More traffic free pedestrian streets	8
Cleaner streets	9
More / better seats or floral displays	A
Better disabled access	B
Shops and services open later in the evening	C
More shops and services open on Sundays	D
Better signposting	E
More traffic free pedestrian streets	F
No improvements	G
Other (PLEASE WRITE IN)	H
(Don't know)	I

ASK ALL

- Q.15 Which centre do you visit most often for your non-food shopping?
DO NOT PROMPT. ONE ANSWER ONLY

ASK IF [STUDY CENTRE] MENTIONED AT Q.15, OTHERS GO TO Q.17:

- Q.16 Which other centre do you visit most often for your non-food shopping?
DO NOT PROMPT. ONE ANSWER ONLY

	Q.15 (20)	Q.16 (21)
Bishop's Stortford	1	1
Braintree	2	2
<u>Brandon</u>	<u>3</u>	<u>3</u>
Bury St. Edmunds	4	4
Cambridge	5	5
<u>Downham Market</u>	<u>6</u>	<u>6</u>
Ely	7	7
Haverhill	8	8
<u>Huntingdon</u>	<u>9</u>	<u>9</u>
King's Lynn	A	A
Lakenheath	B	B
<u>Mildenhall</u>	<u>C</u>	<u>C</u>
Newmarket	D	D
Norwich	E	E
<u>RAF Lakenheath (Commissary)</u>	<u>F</u>	<u>F</u>
RAF Mildenhall (Commissary)	G	G
Saffron Walden	H	H
<u>St Neots</u>	<u>I</u>	<u>I</u>
Stowmarket	J	J
Sudbury	K	K
<u>Swaffham</u>	<u>L</u>	<u>L</u>
Thetford	M	M
Wisbech	N	N
Other (PLEASE WRITE IN)	O	O
<hr/>		
(No other centre visited)	P	P
(Don't know)	Q	Q

ASK IF [STUDY CENTRE] NOT MENTIONED AT Q.15, OTHERS GO TO INSTR. AT Q.18: SHOWCARD 'D'

- Q.17 On average, how often do you visit (CENTRE MENTIONED AT Q15)?
DO NOT PROMPT. ONE ANSWER ONLY

ASK IF [STUDY CENTRE] NOT MENTIONED AT Q.16, OTHERS GO TO Q.19: SHOWCARD 'D'

- Q.18. And on average, how often do you visit (CENTRE MENTIONED AT Q16)?
DO NOT PROMPT. ONE ANSWER ONLY

	Q.17 (22)	Q.18 (23)
Everyday	1	1
5 times a week	2	2
<u>4 times a week</u>	<u>3</u>	<u>3</u>
3 times a week	4	4
Twice a week	5	5
<u>Once a week</u>	<u>6</u>	<u>6</u>
Once every two weeks	7	7
Once a month	8	8
<u>Once every six months</u>	<u>9</u>	<u>9</u>
Once a year	A	A
(Don't know / varies)	B	B

ASK ALL: SHOWCARD 'E'

Q.19 How often do you go to [STUDY CENTRE] in the evening?

ONE ANSWER ONLY

	(24)	
Everyday	1	GO TO Q.21
2-3 times a week	2	GO TO Q.21
Once a week	3	GO TO Q.21
Fortnightly	4	GO TO Q.21
Once a month	5	GO TO Q.21
Once every 2-3 months	6	GO TO Q.21
Once every 4-5 months	7	GO TO Q.21
Once every six months	8	GO TO Q.21
Less often	9	GO TO Q.21
Never	A	GO TO Q.20
(Don't know)	B	GO TO Q.21

ASK IF 'NEVER' AT Q.19, OTHERS GO TO Q.21

Q.20 Why do you never visit [STUDY CENTRE] in the evening?

DO NOT PROMPT. CAN BE MULTI-CODED Why else?

	(25)	
Difficult to park	1	
Poor public transport	2	
Feels unsafe	3	
Poor street lighting	4	
Poor cafes, restaurants or bars	5	
Poor leisure, entertainment or cultural facilities	6	
Poor value for money / high prices	7	
Nothing open	8	
Streets dirty	9	
Vandalism	A	
Graffiti	B	
Other (PLEASE WRITE IN)	C	
<hr/>		
Nothing / very little	D	
(Don't know)	E	

GO TO RESPONDENT DETAILS

ASK IF VISIT IN THE EVENING AT Q.19, OTHERS GO TO RESP. DET.: SHOWCARD 'F'

Q.21 What are your main reasons for visiting the town centre in the evening?

CAN BE MULTI-CODED What else?

	(26)	
Pubs / bars	1	
Cafes / restaurants	2	
Nightclub	3	
Cinema/Theatre	4	
Church or other place of worship	5	
Sports centre	6	
Other health and fitness centre	7	
Live there / visiting friends / family	8	
Library	9	
Other (PLEASE WRITE IN)	A	
<hr/>		
(No main reason)	B	

ASK IF VISIT IN THE EVENING AT Q.19, OTHERS GO TO RESP. DET.

Q.22 What do you like about the town centre in the evening?

DO NOT PROMPT

ONE RESPONSE PER '1st' COLUMN

'OTHERS' COLUMN CAN BE MULTI-CODED

	(27)	(28)
	1 st Mention	Other Mentions
Good cafes, restaurants or bars	1	1
Good leisure, entertainment or cultural facilities	2	2
Good value for money / low prices	3	3
Attractive environment/nice place	4	4
Easy to get to by car	5	5
<u>Good car parking</u>	6	6
Easy to get to by public transport	7	7
Clean streets	8	8
<u>Good street lighting</u>	9	9
Good safety / security	A	A
Nothing / very little	B	B
Other (PLEASE WRITE IN)	C	C
<hr/>		
(Don't know)	D	D

ASK IF VISIT IN THE EVENING AT Q.19, OTHERS GO TO RESP. DET.

Q.23 What do you dislike about the town centre in the evening?

DO NOT PROMPT

ONE RESPONSE PER '1st' COLUMN

'OTHERS' COLUMN CAN BE MULTI-CODED

	(29)	(30)
	1 st Mention	Other Mentions
Difficult to park	1	1
Poor public transport	2	2
Feels unsafe	3	3
Poor street lighting	4	4
Poor cafes, restaurants or bars	5	5
Poor leisure, entertainment or cultural facilities	6	6
Poor value for money / high prices	7	7
Facilities close too early	8	8
<u>Streets dirty</u>	9	9
Vandalism	A	A
Graffiti	B	B
<u>Nothing / very little</u>	C	C
Other (PLEASE WRITE IN)	D	D
<hr/>		
(Don't know)	E	E

ASK IF VISIT IN THE EVENING AT Q.19, OTHERS GO TO RESP. DET.: SHOWCARD 'G'

Q.24 When you come to the town centre in the evening, how would you rate the following?

READ OUT STATEMENTS ONE ANSWER ONLY FOR EACH STATEMENT

	Very Good	Quite Good	Neither	Quite Poor	Very Poor	(Don't know)
	(31)	(32)	(33)	(34)	(35)	(36)
Car parking	1	1	1	1	1	1
Bus services	2	2	2	2	2	2
<u>Safety and security</u>	3	3	3	3	3	3
Range of evening attractions	4	4	4	4	4	4
Quality of evening attractions	5	5	5	5	5	5
Value for money in evening attractions	6	6	6	6	6	6
Cleanliness of streets	7	7	7	7	7	7
Attractiveness of the town centre	8	8	8	8	8	8

RESPONDENT DETAILS

FOR THE PURPOSE OF HEAD OFFICE CHECKING THE QUALITY OF MY WORK, MAY I TAKE YOUR NAME, ADDRESS AND CONTACT TELEPHONE NUMBER PLEASE?

INTERVIEWER: PLEASE RECORD IN BLOCK CAPITALS.

NAME: _____

ADDRESS: _____

TEL NO: _____

CLASSIFICATION

GENDER:	(37)	AGE GROUP:	(38)
Male	1	16 – 24 years	1
Female	2	25 – 34 years	2
		<u>35 – 44 years</u>	<u>3</u>
		45 – 54 years	4
		55 – 64 years	5
		<u>65+ years</u>	<u>6</u>
		(Refused)	7

OCCUPATION OF CHIEF WAGE EARNER: _____
(IF RETIRED ASK FOR PREVIOUS OCCUPATION)

	(39)
A	1
B	2
<u>C1</u>	<u>3</u>
C2	4
D	5
E	6

LOCATION OF INTERVIEW

	(40)
Newmarket Location 1	1
Newmarket Location 2	2
<u>Brandon</u>	<u>3</u>
Mildenhall	4

DATE OF INTERVIEW:

	(41)
Monday	1
Tuesday	2
<u>Wednesday</u>	<u>3</u>
Thursday	4
Friday	5
Saturday	6

TIME OF INTERVIEW:

	(42)
09.00 – 12.00	1
<u>12.01 – 14.00</u>	<u>2</u>
14.01 – 16.00	3
16.01 – 17.00	4
17.01 – 18.00	5

DECLARATION: I certify that the interview has been personally carried out by me with the informant and conducted within the MRS Code of Conduct. I further certify that the informant is not a friend or relative of mine and I have not interviewed him / her on any survey in the last six months.

(43) (44)

INTERVIEWERS SIGNATURE: _____

DATE:

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Newmarket

GETTING THE MOST FROM YOUR GOAD CENTRE REPORT

Each shopping centre has its own unique mix of multiple outlets, independent shops, convenience and comparison stores, food outlets and vacant premises.

Understanding the retail composition of a centre and its effect on local consumers is crucial to the success of any business. By studying the information in the report, you will be able to examine site quality, evaluate threats and opportunities, and assess the vitality and viability of the centre. However, you will only achieve this if you are aware of the various implications of the data that you see. This guide is designed to help you interpret the information you see on the Goad Centre Report.

1. The Local Area

The map in the top left-hand corner of your report locates other local Goad centres. When evaluating the quality of a site, it is often beneficial to compare it with other local shopping centres. Goad Centre Reports are available for any of the highlighted centres.

2. The Indexing System

A simple indexing system appears throughout the report. This illustrates the difference between a percentage figure for the centre and the UK average. An index of 100 represents an exact match, anything less than 100 indicates a below average count for the centre, and a figure over 100 represents an above average count.

For example, if restaurants accounted for 10% of a centre's outlets and the UK average was also 10%, the index would be 100. If however, the UK average was 8%, the index would be 125.

The index is an effective gap analysis tool and can be used to identify areas that are under and over represented within a centre. A retail category that is heavily under represented could indicate poor local demand. On the other hand, it could show that there is an untapped market waiting to be serviced. Either way, it provides a strong indication that the site will need to be examined further.

3. Floor Space

The floor space figures shown on the report are derived from the relevant Goad Plan, but only show the footprint floorspace, and the site area without the building lines. They should not therefore be read as a definitive report of floor space, but do provide a useful means of comparison between centres, as all outlets are measured in a consistent manner.

4. Vacant Outlets

Comparing the number of vacant outlets with the UK average provides a useful insight into the current economic status of a centre. For example, a high index generally represents under-development or decay, while a low index shows a strong retail presence.

5. Multiple Outlets/Key Attractors

A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can greatly enhance the appeal of

a centre to local consumers: The strong branding and comprehensive product mix of retailers such as Marks & Spencer, Boots and HMV is often sufficient in itself to attract consumers to a centre. Approximately 27 national multiples have been identified as key attractors, (i.e. those retailers most likely to improve the consumer appeal of a centre). The presence of multiple outlets and key attractors can have a significant impact on neighbouring outlets. While other retailers will undoubtedly benefit from increased pedestrian traffic, (and therefore increased sales opportunities), multiples provide fierce competition for rivals in their retail categories.

Also available from Experian:

The Goad Category Reports

Category reports allow you to compare retail centres and breakdown the retail types to allow you to undertake detailed study.

The report allows you to examine site quality, evaluate threats and opportunities and assess the vitality and viability for all the retail centres within your town centres. Provides a comprehensive breakdown of floor space and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial / Business Services and Vacancy sectors.

Using a number of simple indicators, Goad Category reports look at the retail composition and its impact on local consumers. A simple indexing system acts as an effective gap analysis tool, identifying retail categories that are under or over represented within a shopping area. This in turn can indicate an untapped market or poor consumer demand for particular products or services in a retail area.

The Goad Catchment Profile

This measures the extent of the local consumer base, in relation to a shopping centre. It also helps you to recognise the individual groups that make-up a local population, using Mosaic, the world's leading geo-demographic classification system.

Mosaic classifies individuals using census, financial, housing and retail data. Combining this with the profile's information on local household composition and age structure enables you to understand the varied lifestyles and behaviours of individual customers. You can then tailor your products, services and communications to suit local markets, build one-to-one customer relations and generate greater brand loyalty.

Retail Planner

Retail Planner delivers clear, comprehensive, up-to-date expenditure and demographic information to improve your planning-related decisions:

- Estimate future spending on retail goods and leisure services
- Identify changes in the efficiency of retail floor space
- Explain past trends and forecast business turnover potential
- Demonstrate retail planning knowledge to your clients

Goad Network

A Goad plan provides a bird's-eye view of a retail centre, illustrating the fascia name, retail category, floor space and exact location of all retail outlets and vacant premises. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing

you to instantly assess the site quality of existing or prospective store locations in an easy to use Goad Network internet service.

Access the service at

<http://www.goadnetwork.co.uk>

Historic Plans

Historic Goad plans dating back to 1968 are available for you to compare retail mix over a period of time and are ideal for supporting planning and consultancy services. Plans surveyed after 1999 are also available in a digital format and can be uploaded to your Goad Network service, allowing you to make online comparisons.

Bespoke Goads

Our Cartography team can produce paper or PDF copies of Goad plans that identify Use Class, floor space variations and can display client data in a variety of mediums. Gap Analysis of multiple Goad plans can be presented in a clear visual manner, which allows clients to run comparisons of neighbouring locations

Demographics Online

DOL is the one stop shop for organisations requiring a quick, clear and actionable source of on-line demographic data that helps clients analyse existing and potential retail locations. Our DOL service provides clients with access to UK census data, and award winning market segmentation data in simple, easy to read, local area information reports specified by you. The report packs include sections on population statistics, age analysis, employment data and many others. The interactive mapping section allows you to map drive-times around your locations and view your customers. Our off the shelf reports include maps, charts and tables to help your understanding; or tailor the data to meet your own requirements. Subscription is for a year and usage is unlimited!

Shop Point

Shop Point is a comprehensive database covering all retail locations in the UK and the main towns and cities in the Republic of Ireland. It combines data from Experian's Goad Retail Database, Experian's National Business Database, Catalyst and other researched sources, for example, the Internet, direct contact with retailers, and industry publications. The data set includes over 30 pieces of retail information including: Fascia, address, floor space and co-ordinates.

For further details on these products or if you have any queries regarding your Goad Centre Report, please contact Experian on:

Tel: 0845 601 6011

Fax: 0115 968 5003

E-mail: goad.sales@uk.experian.com

Newmarket



Survey Date: 17-Mar-11

Closest Centres	Distance (km)
Mildenhall	13.1
Haverhill	18.1
Cambridge - Mill Road	18.8
Cambridge - The Grafton	19.0
Ely	19.7

Key Retail Indicators

Total Outlets	214
Total Floorspace (sq ft)	412,700

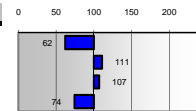
	Count	%	% UK	Index
Vacant Outlets	21	9.81	13.20	74
Vacant Floorspace (sq ft)	28,200	6.83	11.52	59
Multiple Outlets	76	35.51	29.92	119
Comparison Outlets	99	46.26	41.71	111

Major Retailers

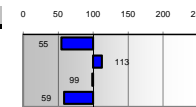
Argos	1	Next	0
BhS	0	O2	0
Boots The Chemist	1	Phones 4 U	1
Burton	0	Primark	0
Carphone Warehouse	1	River Island	0
Clarks	1	Sainsburys	0
Clintons	1	Superdrug	1
Debenhams	0	T K Maxx	1
Dorothy Perkins	1	Tesco	0
H & M	0	Topman	0
H M V	0	Topshop	0
House of Fraser	0	Vodafone	1
John Lewis	0	Waitrose	1
Marks & Spencer	1	Waterstones	0
New Look	1	WHSmith	2
		Wilkinsons	0

Retail Composition

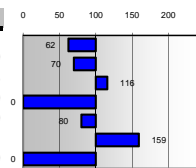
Retail Trade Group	Outlets Number	%	% UK	Index
Convenience	12	5.61	9.02	62
Comparison	99	46.26	41.71	111
Service	80	37.38	34.89	107
Vacant	21	9.81	13.20	74



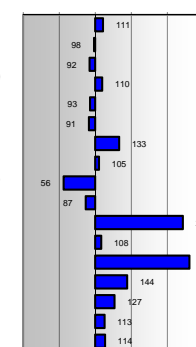
Multiple Retailers by Trade Group	Count	%	% UK	Index
Convenience	5	6.58	12.05	55
Comparison	46	60.53	53.75	113
Service	24	31.58	31.96	99
Miscellaneous	1	1.32	2.24	59



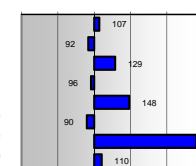
Retail Category	Count	%	% UK	Index
Convenience	12	5.61	9.02	62
Bakers	3	1.40	2.01	70
Butchers	2	0.93	0.81	116
Greengrocers & fishmongers	0	0.00	0.64	0
Groceries & frozen foods	5	2.34	2.92	80
Off licences & home brew	2	0.93	0.59	159
CTN & convenience	0	0.00	2.06	0



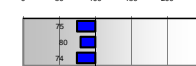
Comparison	99	46.26	41.71	111
Footwear & repairs	4	1.87	1.90	98
Mens, boys wear	2	0.93	1.01	92
Womens, girls & childrens clothing	11	5.14	4.68	110
Mixed & general clothing	7	3.27	3.52	93
Furniture, carpets, textiles	7	3.27	3.58	91
Books, arts/crafts, stationers/copy	12	5.61	4.21	133
Elec, home ent, 'phones & video	9	4.21	4.00	105
DIY, hardware & household goods	3	1.40	2.50	56
Gifts, china, glass & leather goods	3	1.40	1.61	87
Cars, motor cycles & accessories	6	2.80	1.26	222
Chemists, toiletries & opticians	9	4.21	3.88	108
Variety, department & catalogue	3	1.40	0.61	231
Florists & gardens	3	1.40	0.97	144
Sports, toys, cycles & hobbies	6	2.80	2.21	127
Jewellers, clocks & repairs	5	2.34	2.07	113
Charity, pets & other comparison	9	4.21	3.70	114



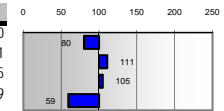
Service	80	37.38	34.89	107
Restaurants, cafes, fast food	31	14.49	15.76	92
Hairdressing, beauty & health	23	10.75	8.34	129
Launderettes & dry cleaners	2	0.93	0.98	96
Travel agents	4	1.87	1.26	148
Banks & financial services	8	3.74	4.16	90
Building societies	3	1.40	0.58	240
Estate agents & auctioneers	9	4.21	3.81	110



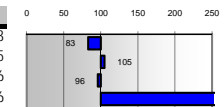
Miscellaneous	23	10.75	14.37	75
Employment, careers, POs & info	2	0.93	1.18	80
Vacant	21	9.81	13.20	74



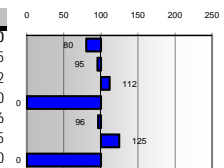
	sq.ft	Floorspace sq.m	%	% UK	Index
Convenience	57,000	5,295	13.81	17.23	80
Comparison	215,500	20,021	52.22	47.15	111
Service	100,000	9,290	24.23	23.08	105
Vacant	28,200	2,620	6.83	11.52	59



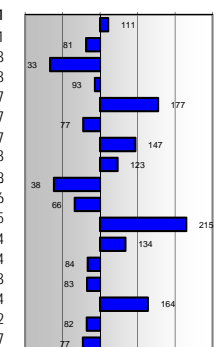
	sq.ft	Floorspace sq.m	%	% UK	Index
Convenience	51,500	4,785	20.41	24.64	83
Comparison	148,100	13,759	58.70	55.99	105
Service	43,700	4,060	17.32	18.07	96
Miscellaneous	9,000	836	3.57	1.29	276



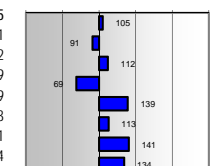
	sq.ft	Floorspace sq.m	%	% UK	Index
Convenience	57,000	5,295	13.81	17.23	80
Bakers	4,000	372	0.97	1.02	95
Butchers	2,000	186	0.48	0.43	112
Greengrocers & fishmongers	0	0	0.00	1.31	0
Groceries & frozen foods	49,100	4,562	11.90	12.36	96
Off licences & home brew	1,900	177	0.46	0.37	125
CTN & convenience	0	0	0.00	1.74	0



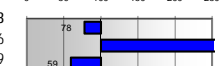
Comparison	215,500	20,021	52.22	47.15	111
Footwear & repairs	4,500	418	1.09	1.34	81
Mens, boys wear	1,200	111	0.29	0.87	33
Womens, girls & childrens clothing	15,800	1,468	3.83	4.12	93
Mixed & general clothing	45,200	4,199	10.95	6.18	177
Furniture, carpets, textiles	13,000	1,208	3.15	4.07	77
Books, arts/crafts, stationers/copy	19,300	1,793	4.68	3.18	147
Elec, home ent, 'phones & video	16,100	1,496	3.90	3.16	123
DIY, hardware & household goods	7,300	678	1.77	4.61	38
Gifts, china, glass & leather goods	2,400	223	0.58	0.88	66
Cars, motor cycles & accessories	17,300	1,607	4.19	1.95	215
Chemists, toiletries & opticians	21,700	2,016	5.26	3.93	134
Variety, department & catalogue	22,400	2,081	5.43	6.50	84
Florists & gardens	1,500	139	0.36	0.44	83
Sports, toys, cycles & hobbies	16,500	1,533	4.00	2.44	164
Jewellers, clocks & repairs	3,200	297	0.78	0.94	82
Charity, pets & other comparison	8,100	753	1.96	2.55	77



Service	100,000	9,290	24.23	23.08	105
Restaurants, cafes, fast food	40,800	3,790	9.89	10.86	91
Hairdressing, beauty & health	18,300	1,700	4.43	3.96	112
Launderettes & dry cleaners	1,300	121	0.31	0.46	69
Travel agents	4,300	399	1.04	0.75	139
Banks & financial services	20,800	1,932	5.04	4.46	113
Building societies	2,800	260	0.68	0.48	141
Estate agents & auctioneers	11,700	1,087	2.83	2.11	134



Miscellaneous	40,200	3,735	9.74	12.53	78
Employment, careers, POs & info	12,000	1,115	2.91	1.02	286
Vacant	28,200	2,620	6.83	11.52	59



For a Goad Paper Plan, a Goad Catchment Report or if you have any queries please contact Experian on tel: 0845 601 6011 or fax: 0115 968 5003 or E-mail: goad.sales@uk.experian.com

TERMS AND CONDITIONS

1. DEFINITIONS

"this agreement" means the terms and conditions hereunder and the correspondence between the parties attached hereto.

"Experian" means Experian Group Limited.

"the Client" means the person, firm or limited company to whom the Services are to be provided.

"the Information" means any information (in whatsoever form) provided to the Client by Experian in connection with the Services.

"the Media" means the records, tapes or other materials and documents by which the information is communicated to the Client.

"the Services" means the services to be provided by Experian to the Client more particularly described in the correspondence between the parties attached hereto.

2. CONTRACT TERMS

Subject to Clause 14 hereunder this Agreement shall be on the terms and conditions set out below to the exclusion of any other terms and conditions whether or not the same are endorsed upon, delivered with or referred to in any document delivered or sent by the client to Experian.

3. PAYMENT OF CHARGES

3.1 The charges for the Services ("the Charges") shall be specified by Experian to the Client.

3.2 The Client shall pay the Charges within 28 days of the date of Experian's invoice thereof.

3.3 Interest at an annual rate of 5% above Barclays Bank plc's base rate from time to time shall accrue daily and be calculated on a daily basis on any sum overdue from the date of invoice until payment in full of the Charges.

3.4 Unless expressly stated otherwise the Charges shall be exclusive of VAT (or any other duty chargeable in respect thereof) (which for the avoidance of doubt shall be payable by the Client in accordance with the terms and conditions hereof).

4. PROVISION OF THE SERVICES

4.1 Experian shall use all reasonable endeavours to ensure that the information is accurate in all material respects.

4.2 Save as provided in sub-clause 4.1 above or otherwise expressly provided in this Agreement or to the extent that it is unlawful for any said representations and warranties to be excluded Experian makes no representations or warranties whether express or implied (by statute or otherwise) in connection with the Services or use thereof by the Client or otherwise in connection with this Agreement.

4.3 The parties hereto agree that the time for the performance of Experian's obligations in connection with the Services shall not be of the essence in this Agreement.

5. LIMITATION OF LIABILITY

Notwithstanding anything to the contrary contained in this Agreement:

5.1 Experian shall not be liable (whether in contract or in negligence (other than the liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) or other tort or otherwise) for any indirect or consequential loss of any kind whatsoever (including without limitation loss of profit or loss of business) suffered by the Client in connection with the Services.

5.2 Without prejudice to the provisions of sub-clause 4.1 above Experian's maximum aggregate liability hereunder (other than liability in respect of death or personal injury arising out of the negligence of Experian its servants or agents) whether for breach of this Agreement or otherwise and whether or not arising from the negligence of Experian or any other person involved directly or indirectly in the provision of the Services shall not exceed an amount equal to the Charges (exclusive of VAT) payable to Experian hereunder.

6. COPYRIGHT

Property and the copyright (and all other intellectual property rights) in the Media and the Information (other than any information which has passed to Experian by the Client in connection with the Services or which has been obtained from any third party by Experian which copyright and all other intellectual property rights as appropriate shall remain vested in such third party) shall at all times remain vested in Experian.

7. CONFIDENTIALITY

7.1 The Client undertakes that it shall use the Information solely for the purpose of its own business and shall not (without the prior written consent of Experian) copy reproduce publish or transmit any part of the Information in any manner whatsoever and the media shall be returned to Experian upon demand.

7.2 The Client undertakes with Experian that the Client shall permit access to the Information only to those of its authorised officers or employees who need to know or use the Information and that the Client shall procure that its offices and employees shall maintain in strictest confidence and not divulge communicate or permit access to any third party any confidential information relating to Experian.

7.3 For the purpose of sub-clause 7.2 hereof the expression "confidential information" shall mean (as the context may require)

7.3.1 the Information; and/or

7.3.2 any information concerning Experian's trade secrets or business dealings transactions or affairs which may come to the notice of the client; and/or

7.3.3 any information and/or know how relating to the methods or techniques used by Experian in devising and developing the Services and any tapes documents or other materials comprising any part of such information and/or know how made available by Experian hereunder.

7.4 The provisions of sub-clause 7.2 hereof shall not apply to any confidential information to the extent that:

7.4.1 the Client is required to divulge the same by a Court tribunal or government authority with competent jurisdiction

7.4.2 it has already come within the public domain

7.4.3 it was already known to the Client prior to the date of disclosure by Experian (as evidence by written records)

8. INDEMNITY

The Client shall indemnify and keep indemnified Experian from and against any and all liability loss claims demands costs or expenses of any kind whatsoever which shall at any time suffer or incur and which arise out of or in connection with the services provided that this indemnity shall not apply to the extent that any such liability arises of the default of Experian.

9. DATA PROTECTION ACT 1984

The Client undertakes that at all times they shall comply fully with the provisions of the Data Protection Act 1984 and any subsequent amendments thereto or re-enactments thereof.

10. TERMINATION

10.1 Experian shall be entitled to terminate this Agreement immediately by written notice to the Client if:

10.1.1 The Client is guilty of any material breach of the provisions of this Agreement and such breach if capable of remedy is not remedied within twenty one working days of written notice having been given to remedy such breach.

10.1.2 The Client has had a bankruptcy order made against it or has made an arrangement or composition with its creditors or (being a body corporate) has had convened a meeting of creditors (whether formal or informal) or has entered into liquidation (whether voluntary or compulsory) except a solvent voluntary liquidation for the purpose only of reconstruction or amalgamation or has a receiver manager administrator or administrative receiver appointed of its undertaking or any part thereof or a resolution has been passed or a petition presented to any Court for the winding-up of the Client or for the granting of an administration order in respect of the Client or any proceedings have been commenced relating to the insolvency of the Client.

10.2 The termination of this Agreement shall be without prejudice to the rights of Experian accrued prior to such termination.

11. FORCE MAJEURE

Notwithstanding anything herein contained neither party shall be under any liability to the other in respect of any failure to perform or delay in performing any of the obligations hereunder which is due to any cause of whatsoever nature beyond its reasonable control and no such failure or delay shall be deemed for any purposes to be a breach of this Agreement.

12. ASSIGNMENT

The rights granted to the Client hereunder are personal to it and the Client shall not assign or grant any rights in respect of or otherwise deal in the same.

13. WAIVER

Failure by either party to enforce any of the provisions of this Agreement shall not operate as a waiver of any of its rights hereunder or operate so as to bar the exercise or enforcement thereof at any time or times.

14. VARIATIONS

This Agreement constitutes the whole of the terms agreed between the parties hereto in respect of the subject matter hereof and supersedes all previous negotiations, understandings or representations and shall be capable of being varied only by an instrument in writing signed by a duly authorised representative of each of the parties hereto.

15. NOTICE

Any notice to be given hereunder by either party to the other may be given by first class mail addressed to the party of the address herein specified or such other address as such party may from time to time nominate for the purpose hereof or by telex or telefax and shall be deemed to have been served.

15.1 If given by mail seventy-two hours after the same shall have been despatched and

15.2 If given by telex or telefax one hour after transmission (if transmitted during normal business hours) and twelve hours after transmission (if transmitted outside normal business hours).

16. SEVERANCE

This Agreement is severable in that if any provision hereof is determined to be illegal or unenforceable by any Court or competent jurisdiction such provision shall be deemed to have been deleted without affecting the remaining provisions of this Agreement.

17. LAW

This Agreement shall be governed by and construed in accordance with English Law and the parties hereto agree that the English Courts shall have exclusive jurisdiction.

Convenience Goods Capacity Assessment - 2011 Market Share Analysis

TABLE 1: CONVENIENCE GOODS MARKET SHARE (% and £m)

	Market Share (%)													Trade Draw (£m, in 2009 prices)												
	Zone 1	Zone 2	Zone 3	Core Catchment Area (CCA)	Zone 4	Zone 10	Secondary Catchment Area (SCA)	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Northern Catchment Area (NCA)	Zone 1	Zone 2	Zone 3	Core Catchment Area (CCA)	Zone 4	Zone 10	Secondary Catchment Area (SCA)	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Northern Catchment Area (NCA)
				Zones 1-3			Zones 4 & 10						Zones 5-9				Zones 1-3			Zones 4 & 10						Zones 5-9
Total Convenience Expenditure	£44.9	£78.3	£47.6	£170.8	£50.171	£19.385	£69.6	£24.1	£99.5	£28.3	£82.9	£57.7	£292.5													
Newmarket Town Centre																										
Waitrose, Fred Archer Way	3.9%	21.2%	0.0%	10.7%	6.9%	0.0%	5.0%	0.0%	0.5%	0.5%	0.9%	2.6%	1.0%	£1.7	£16.6	£0.0	£18.3	£3.5	£0.0	£3.5	£0.0	£0.5	£0.2	£0.8	£1.5	£3.0
Iceland, Crown Walk	0.0%	2.5%	0.0%	1.1%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	£0.0	£1.9	£0.0	£1.9	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2
Marks & Spencer, The Rookery	0.0%	2.6%	0.0%	1.2%	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£2.0	£0.0	£2.0	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other Local Shops/Market	0.0%	2.9%	0.0%	1.3%	0.2%	0.0%	0.1%	0.0%	0.3%	0.0%	0.3%	0.3%	0.2%	£0.0	£2.3	£0.0	£2.3	£0.1	£0.0	£0.1	£0.0	£0.3	£0.0	£0.2	£0.2	£0.7
subtotal	3.9%	29.2%	0.0%	14.4%	7.5%	0.0%	5.4%	0.0%	0.8%	0.5%	1.2%	3.2%	1.3%	£1.7	£22.9	£0.0	£24.6	£3.8	£0.0	£3.8	£0.0	£0.8	£0.2	£1.0	£1.9	£3.8
Brandon Town Centre																										
Aldi	0.0%	0.0%	14.7%	4.1%	0.0%	10.2%	2.8%	2.4%	0.0%	0.3%	0.7%	0.0%	0.4%	£0.0	£0.0	£7.0	£7.0	£0.0	£2.0	£2.0	£0.6	£0.0	£0.1	£0.6	£0.0	£1.2
Other Local Shops/Market	0.0%	0.0%	2.1%	0.6%	0.0%	0.6%	0.2%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£0.0	£1.0	£1.0	£0.0	£0.1	£0.1	£0.1	£0.0	£0.0	£0.0	£0.0	£0.1
subtotal	0.0%	0.0%	16.8%	4.7%	0.0%	10.8%	3.0%	2.7%	0.0%	0.3%	0.7%	0.0%	0.4%	£0.0	£0.0	£8.0	£8.0	£0.0	£2.1	£2.1	£0.7	£0.0	£0.1	£0.6	£0.0	£1.3
Mildenhall Town Centre																										
Sainsbury's, Recreation Way	38.4%	0.7%	4.9%	11.8%	3.0%	2.2%	2.8%	0.0%	0.0%	1.0%	0.0%	0.0%	0.1%	£17.3	£0.5	£2.3	£20.1	£1.5	£0.4	£1.9	£0.0	£0.0	£0.3	£0.0	£0.0	£0.3
Co-Op, Kings Street	6.1%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£2.7	£0.0	£0.0	£2.7	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Other Local Shops/Market	0.9%	0.0%	0.3%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.4	£0.0	£0.1	£0.5	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
subtotal	45.5%	0.7%	5.2%	13.7%	3.0%	2.2%	2.8%	0.0%	0.0%	1.0%	0.0%	0.0%	0.1%	£20.4	£0.5	£2.5	£23.4	£1.5	£0.4	£1.9	£0.0	£0.0	£0.3	£0.0	£0.0	£0.3
Local Centres																										
Lakenheath	1.1%	0.3%	5.7%	2.0%	0.0%	2.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	£0.5	£0.2	£2.7	£3.4	£0.0	£0.4	£0.4	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2
Subtotal: In Centre	50.4%	30.2%	27.7%	34.8%	10.5%	14.9%	11.7%	2.7%	0.8%	1.8%	1.9%	3.5%	1.9%	£22.6	£23.6	£13.2	£59.4	£5.3	£2.9	£8.2	£0.7	£0.8	£0.5	£1.6	£2.0	£5.6
Out of Centre																										
Tesco, Fordham Road (Newmarket)	20.9%	44.9%	1.2%	26.4%	14.5%	0.2%	10.5%	0.0%	0.7%	1.4%	0.0%	1.6%	0.7%	£9.4	£35.1	£0.6	£45.1	£7.3	£0.0	£7.3	£0.0	£0.7	£0.4	£0.0	£1.0	£2.0
Asda, Studlands Retail Park (Newmarket)	0.0%	6.4%	0.0%	2.9%	2.1%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.0	£5.0	£0.0	£5.0	£1.0	£0.0	£1.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, London Road (Brandon)	0.3%	0.0%	22.2%	6.3%	0.0%	4.8%	1.3%	1.0%	0.0%	0.0%	0.0%	0.0%	0.1%	£0.2	£0.0	£10.6	£10.7	£0.0	£0.9	£0.9	£0.2	£0.0	£0.0	£0.0	£0.0	£0.2
RAF Bases	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%												£0.0	
Other	0.3%	1.7%	0.0%	0.9%	0.2%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	£0.2	£1.3	£0.0	£1.5	£0.1	£0.0	£0.1	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
Subtotal: Out of Centre	21.6%	53.0%	23.4%	36.5%	16.8%	5.0%	13.6%	1.0%	0.7%	1.4%	0.0%	1.6%	0.8%	£9.7	£41.5	£11.2	£62.3	£8.4	£1.0	£9.4	£0.2	£0.7	£0.4	£0.0	£1.0	£2.2
Subtotal: District	72.0%	83.1%	51.1%	71.3%	27.3%	20.0%	25.3%	3.7%	1.5%	3.2%	1.9%	5.2%	2.7%	£32.3	£65.1	£24.3	£121.8	£13.7	£3.9	£17.6	£0.9	£1.5	£0.9	£1.6	£3.0	£7.9
Outside District																										
Bury St. Edmunds	17.6%	5.8%	3.6%	8.3%	2.8%	2.1%	2.6%	3.4%	78.5%	60.4%	1.4%	0.6%	33.3%	£7.9	£4.6	£1.7	£14.2	£1.4	£0.4	£1.8	£0.8	£78.0	£17.1	£1.1	£0.4	£97.5
Cambridge	0.8%	4.0%	0.0%	2.0%	1.3%	0.0%	0.9%	0.0%	0.3%	0.0%	3.2%	17.3%	4.4%	£0.3	£3.1	£0.0	£3.5	£0.7	£0.0	£0.7	£0.0	£0.3	£0.0	£2.6	£10.0	£12.9
Ely	2.7%	0.9%	0.9%	1.4%	42.5%	1.4%	31.1%	1.4%	1.2%	1.0%	0.0%	47.2%	9.9%	£1.2	£0.7	£0.5	£2.4	£21.3	£0.3	£21.6	£0.3	£1.2	£0.3	£0.0	£27.2	£29.0
King's Lynn	0.0%	0.0%	0.0%	0.0%	0.0%	6.6%	1.8%	2.5%	0.0%	0.0%	0.0%	0.7%	0.3%	£0.0	£0.0	£0.0	£0.0	£0.0	£1.3	£1.3	£0.6	£0.0	£0.0	£0.0	£0.4	£1.0
Downham Market	0.3%	0.0%	0.3%	0.2%	0.0%	32.9%	9.2%	2.6%	0.0%	0.0%	0.0%	0.0%	0.2%	£0.2	£0.0	£0.1	£0.3	£0.0	£6.4	£6.4	£0.6	£0.0	£0.0	£0.0	£0.0	£0.6
Thetford	5.3%	1.0%	40.6%	13.1%	0.0%	22.8%	6.4%	75.5%	15.5%	0.3%	0.0%	0.0%	11.5%	£2.4	£0.8	£19.3	£22.4	£0.0	£4.4	£4.4	£18.2	£15.4	£0.1	£0.0	£0.0	£33.6
Haverhill	0.6%	2.5%	0.0%	1.3%	0.0%	0.0%	0.0%	0.3%	0.0%	9.8%	90.8%	0.0%	26.7%	£0.3	£2.0	£0.0	£2.2	£0.0	£0.0	£0.0	£0.1	£0.0	£2.8	£75.3	£0.0	£78.1
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	10.5%	0.0%	0.6%	1.1%	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£3.0	£0.0	£0.4	£3.3
All other	0.7%	2.6%	3.5%	2.3%	26.0%	14.4%	22.8%	10.6%	3.1%	15.0%	2.7%	28.4%	9.8%	£0.3	£2.0	£1.7	£4.0	£13.1	£2.8	£15.9	£2.6	£3.1	£4.2	£2.3	£16.4	£28.5
Subtotal: Outside District	28.0%	16.9%	48.9%	28.7%	72.7%	80.0%	74.7%	96.3%	98.5%	96.8%	98.1%	94.8%	97.3%	£12.5	£13.2	£23.3	£49.0	£36.5	£15.5	£52.0	£23.2	£98.0	£27.4	£81.3	£54.7	£284.7
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	£44.9	£78.3	£47.6	£170.8	£50.2	£19.4	£69.6	£24.1	£99.5	£28.3	£82.9	£57.7	£292.5

Source: Strategic Perspectives HTIS September 2011, which asked where respondents normally undertake their main food, secondary food and top-up shopping.
Notes: Assumption that total convenience spend is divided between main food shopping (65%), secondary food shopping (10%) and top-up shopping (25%).

FOREST HEATH DISTRICT COUNCIL

2011 Retail and Leisure Study

Comparison Goods Capacity Assessment - 2011 Market Share Analysis (%)



TABLE 1: COMPARISON GOODS MARKET SHARES (%): ALL COMPARISON GOODS

CENTRE / SHOPPING LOCATION	Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)
	Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9
TOTAL EXPENDITURE:	£68.5	£118.6	£69.9	£256.9	£103.9	£447.5
FOREST HEATH DISTRICT:						
Newmarket Town Centre	12.3%	42.2%	2.3%	23.3%	10.7%	0.9%
Newmarket Out of Centre	5.3%	8.3%	0.3%	5.3%	4.3%	0.2%
Brandon	0.0%	0.0%	10.6%	2.9%	0.4%	0.1%
Mildenhall	8.9%	0.0%	2.0%	2.9%	0.9%	0.1%
Lakenheath	0.0%	0.0%	0.5%	0.1%	0.4%	0.0%
RAF Bases	1.2%	0.0%	0.0%	0.3%	0.0%	0.0%
ALL FLOORSACE IN DISTRICT	27.7%	50.5%	15.7%	34.9%	16.7%	1.2%
OUTSIDE DISTRICT:						
Bury St. Edmunds	54.8%	17.2%	38.6%	33.1%	11.7%	51.6%
Cambridge	12.2%	27.8%	3.6%	17.1%	19.8%	16.0%
Ely	0.6%	0.9%	0.5%	0.7%	23.5%	2.3%
King's Lynn	0.0%	0.0%	1.5%	0.4%	9.6%	0.5%
Downham Market	0.0%	0.0%	0.1%	0.0%	4.2%	0.1%
Thetford	1.6%	0.0%	35.5%	10.1%	3.6%	8.9%
Haverhill	0.0%	0.1%	0.3%	0.1%	0.0%	10.2%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
(Norwich)	0.9%	0.0%	3.0%	1.1%	1.8%	4.6%
Other Shopping Facilities Outside District	2.2%	3.5%	1.2%	2.5%	9.1%	4.1%
ALL FLOORSACE OUTSIDE DISTRICT	72.3%	49.5%	84.3%	65.1%	83.3%	98.8%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

MARKET SHARES (£ million in 2008 prices):

Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)	TOTAL:
Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9	
						£808.4
£8.4	£50.0	£1.6	£60.0	£11.2	£4.1	£75.3
£3.7	£9.8	£0.2	£13.7	£4.5	£0.7	£18.9
£0.0	£0.0	£7.4	£7.4	£0.4	£0.4	£8.2
£6.1	£0.0	£1.4	£7.5	£0.9	£0.3	£8.7
£0.0	£0.0	£0.4	£0.4	£0.4	£0.0	£0.8
£0.8	£0.0	£0.0	£0.8	£0.0	£0.0	£0.8
£18.9	£59.9	£11.0	£89.8	£17.4	£5.5	£112.6
£37.5	£20.4	£27.0	£84.9	£12.1	£230.8	£327.9
£8.4	£33.0	£2.5	£43.9	£20.6	£71.4	£135.9
£0.4	£1.0	£0.3	£1.8	£24.4	£10.3	£36.6
£0.0	£0.0	£1.0	£1.0	£10.0	£2.2	£13.2
£0.0	£0.0	£0.1	£0.1	£4.3	£0.3	£4.7
£1.1	£0.0	£24.8	£25.9	£3.8	£39.9	£69.5
£0.0	£0.1	£0.2	£0.3	£0.0	£45.7	£46.0
£0.0	£0.0	£0.0	£0.0	£0.0	£2.5	£2.5
£0.6	£0.0	£2.1	£2.7	£1.9	£20.6	£25.2
£1.5	£4.1	£0.8	£6.5	£9.5	£18.3	£34.3
£49.5	£58.7	£58.9	£167.2	£86.6	£442.1	£695.8
£68.5	£118.6	£69.9	£256.9	£103.9	£447.5	£808.4

TABLE 2: COMPARISON GOODS MARKET SHARES (%): CLOTHING & FOOTWEAR

CENTRE / SHOPPING LOCATION	Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)
	Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£16.2	£26.9	£17.0	£60.1	£23.6	£105.1
FOREST HEATH DISTRICT:						
Newmarket Town Centre	8.5%	21.1%	2.2%	12.4%	11.5%	0.9%
Newmarket Out of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Brandon	0.0%	0.0%	3.4%	1.0%	0.0%	0.1%
Mildenhall	2.1%	0.0%	0.0%	0.6%	0.9%	0.0%
Lakenheath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Raf Bases	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL FLOORSPACE IN DISTRICT	10.6%	21.1%	5.6%	13.9%	12.3%	1.0%
OUTSIDE DISTRICT:						
Bury St. Edmunds	71.3%	28.9%	56.2%	48.0%	20.8%	53.3%
Cambridge	13.8%	45.6%	6.7%	26.0%	24.3%	22.6%
Ely	0.0%	1.1%	0.0%	0.5%	22.0%	1.6%
King's Lynn	0.0%	0.0%	3.4%	1.0%	12.4%	1.2%
Downham Market	0.0%	0.0%	0.0%	0.0%	1.4%	0.1%
Thetford	0.0%	0.0%	15.7%	4.4%	1.1%	2.7%
Haverhill	0.0%	0.0%	1.1%	0.3%	0.0%	6.4%
Norwich	1.1%	0.0%	9.0%	2.8%	2.5%	8.3%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
OTHER SHOPPING FACILITIES OUTSIDE DISTRICT	3.2%	3.3%	2.2%	3.0%	3.2%	2.2%
ALL FLOORSPACE OUTSIDE DISTRICT	89.4%	78.9%	94.4%	86.1%	87.7%	99.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

MARKET SHARES (£ million in 2008 prices):

Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)	TOTAL:
Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9	
						£188.8
£1.4	£5.7	£0.4	£7.4	£2.7	£0.9	£11.1
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
£0.0	£0.0	£0.6	£0.6	£0.0	£0.1	£0.7
£0.3	£0.0	£0.0	£0.3	£0.2	£0.0	£0.5
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
£1.7	£5.7	£1.0	£8.4	£2.9	£1.0	£12.3
£11.6	£7.8	£9.5	£28.9	£4.9	£56.0	£89.7
£2.2	£12.3	£1.1	£15.6	£5.7	£23.8	£45.2
£0.0	£0.3	£0.0	£0.3	£5.2	£1.7	£7.2
£0.0	£0.0	£0.6	£0.6	£2.9	£1.3	£4.8
£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£0.5
£0.0	£0.0	£2.7	£2.7	£0.3	£2.8	£5.8
£0.0	£0.0	£0.2	£0.2	£0.0	£6.7	£6.9
£0.2	£0.0	£1.5	£1.7	£0.6	£8.7	£11.0
£0.0	£0.0	£0.0	£0.0	£0.0	£0.6	£0.6
£0.5	£0.9	£0.4	£1.8	£0.7	£2.3	£4.8
£14.5	£21.2	£16.0	£51.7	£20.7	£104.0	£176.4
£16.2	£26.9	£17.0	£60.1	£23.6	£105.1	£188.8

TABLE 3: COMPARISON GOODS MARKET SHARES (%): FURNITURE, CARPETS & OTHER FLOOR COVERINGS

CENTRE / SHOPPING LOCATION	Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)
	Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£6.6	£11.9	£6.7	£25.2	£10.1	£43.8
FOREST HEATH DISTRICT:						
Newmarket Town Centre	7.8%	19.1%	0.0%	11.1%	9.9%	0.8%
Studlands/Homebase	3.1%	7.4%	0.0%	4.3%	2.2%	0.1%
Brandon	0.0%	0.0%	6.4%	1.7%	0.0%	0.3%
Mildenhall	3.1%	0.0%	0.0%	0.8%	0.0%	0.0%
Lakenheath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
RAF Bases	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
ALL FLOORSPACE IN DISTRICT	14.1%	26.5%	6.4%	17.9%	12.1%	1.2%
OUTSIDE DISTRICT:						
Bury St. Edmunds	70.3%	32.4%	54.0%	48.1%	22.6%	55.7%
Cambridge	10.9%	39.7%	0.0%	21.6%	33.9%	18.9%
Ely	0.0%	0.0%	0.0%	0.0%	3.3%	0.9%
King's Lynn	0.0%	0.0%	1.6%	0.4%	11.3%	0.1%
Downham Market	0.0%	0.0%	0.0%	0.0%	5.4%	0.0%
Thetford	3.1%	0.0%	30.2%	8.8%	2.3%	6.7%
Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	6.5%
Norwich	0.0%	0.0%	3.2%	0.8%	1.4%	4.3%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
OTHER SHOPPING FACILITIES OUTSIDE DISTRICT	1.6%	1.5%	4.8%	2.4%	7.8%	5.3%
ALL FLOORSPACE OUTSIDE BOROUGH:	85.9%	73.5%	93.7%	82.1%	87.9%	98.8%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

MARKET SHARES (£ million in 2008 prices):

Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)	TOTAL:
Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9	
						£79.1
£0.5	£2.3	£0.0	£2.8	£1.0	£0.3	£4.1
£0.2	£0.9	£0.0	£1.1	£0.2	£0.1	£1.4
£0.0	£0.0	£0.4	£0.4	£0.0	£0.1	£0.5
£0.2	£0.0	£0.0	£0.2	£0.0	£0.0	£0.2
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
£0.9	£3.1	£0.4	£4.5	£1.2	£0.5	£6.2
£4.7	£3.8	£3.6	£12.1	£2.3	£24.4	£38.8
£0.7	£4.7	£0.0	£5.4	£3.4	£8.3	£17.2
£0.0	£0.0	£0.0	£0.0	£0.3	£0.4	£0.7
£0.0	£0.0	£0.1	£0.1	£1.1	£0.1	£1.3
£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.5
£0.2	£0.0	£2.0	£2.2	£0.2	£3.0	£5.4
£0.0	£0.0	£0.0	£0.0	£0.0	£2.9	£2.9
£0.0	£0.0	£0.2	£0.2	£0.1	£1.9	£2.2
£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
£0.1	£0.2	£0.3	£0.6	£0.8	£2.3	£3.7
£5.7	£8.7	£6.2	£20.7	£8.9	£43.3	£72.9
£6.6	£11.9	£6.7	£25.2	£10.1	£43.8	£79.1

TABLE 4: MARKET SHARES (%): HARDWARE, DIY GOODS, DECORATING SUPPLIES & GARDEN PRODUCTS

CENTRE / SHOPPING LOCATION	Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)
	Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£6.5	£11.4	£6.4	£24.3	£9.9	£43.8
FOREST HEATH DISTRICT:						
Newmarket Town Centre	3.4%	17.6%	1.2%	9.5%	5.6%	0.4%
Newmarket Studlands/Homebase	34.1%	67.0%	3.5%	41.6%	37.3%	1.0%
Brandon	0.0%	0.0%	7.1%	1.9%	0.3%	0.1%
Mildenhall	12.5%	0.0%	4.7%	4.6%	2.4%	0.0%
Lakenheath	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
RAF Bases	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	50.0%	84.6%	16.5%	57.5%	45.6%	1.6%
OUTSIDE DISTRICT:						
Bury St. Edmunds	40.9%	6.6%	20.0%	19.3%	5.8%	52.7%
Cambridge	2.3%	7.7%	0.0%	4.2%	10.4%	8.7%
Ely	0.0%	0.0%	0.0%	0.0%	13.2%	1.4%
King's Lynn	0.0%	0.0%	0.0%	0.0%	6.6%	0.1%
Downham Market	0.0%	0.0%	1.2%	0.3%	3.9%	0.1%
Thetford	5.7%	0.0%	62.4%	17.9%	11.8%	15.5%
Haverhill	0.0%	1.1%	0.0%	0.5%	0.0%	16.5%
Norwich	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
OTHER SHOPPING FACILITIES OUTSIDE DISTRICT	1.1%	0.0%	0.0%	0.3%	2.6%	1.7%
	50.0%	15.4%	83.5%	42.5%	54.4%	98.4%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

MARKET SHARES (£ million in 2008 prices):

Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)	TOTAL:
Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9	
						£77.9
£0.2	£2.0	£0.1	£2.3	£0.6	£0.2	£3.1
£2.2	£7.7	£0.2	£10.1	£3.7	£0.4	£14.2
£0.0	£0.0	£0.5	£0.5	£0.0	£0.1	£0.5
£0.8	£0.0	£0.3	£1.1	£0.2	£0.0	£1.3
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
£3.2	£9.7	£1.1	£13.9	£4.5	£0.7	£19.2
£2.6	£0.8	£1.3	£4.7	£0.6	£23.0	£28.3
£0.1	£0.9	£0.0	£1.0	£1.0	£3.8	£5.9
£0.0	£0.0	£0.0	£0.0	£1.3	£0.6	£1.9
£0.0	£0.0	£0.0	£0.0	£0.7	£0.1	£0.7
£0.0	£0.0	£0.1	£0.1	£0.4	£0.1	£0.5
£0.4	£0.0	£4.0	£4.3	£1.2	£6.8	£12.3
£0.0	£0.1	£0.0	£0.1	£0.0	£7.2	£7.3
£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.4
£0.0	£0.0	£0.0	£0.0	£0.0	£0.4	£0.4
£0.1	£0.0	£0.0	£0.1	£0.3	£0.7	£1.1
£3.2	£1.8	£5.3	£10.3	£5.4	£43.1	£58.8
£6.5	£11.4	£6.4	£24.3	£9.9	£43.8	£77.9

TABLE 5: COMPARISON GOODS MARKET SHARES (%): AUDIO-VISUAL ELECTRICAL EQUIPMENT

CENTRE / SHOPPING LOCATION	Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)
	Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£7.4	£13.3	£7.9	£28.6	£12.7	£50.1
FOREST HEATH DISTRICT:						
Newmarket Town Centre	11.3%	42.6%	3.8%	23.8%	8.5%	0.2%
Newmarket Out of Centre	1.9%	3.3%	0.0%	2.0%	0.0%	0.0%
Brandon	0.0%	0.0%	5.8%	1.6%	0.5%	0.0%
Mildenhall	7.5%	0.0%	3.8%	3.0%	0.5%	0.0%
Lakenheath	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%
RAF Bases	3.8%	0.0%	0.0%	1.0%	0.0%	0.0%
	24.5%	45.9%	13.5%	31.4%	10.0%	0.2%
OUTSIDE DISTRICT:						
Bury St. Edmunds	50.9%	11.5%	23.1%	24.9%	8.0%	53.3%
Cambridge	17.0%	41.0%	0.0%	23.4%	39.2%	19.0%
Ely	0.0%	0.0%	0.0%	0.0%	16.9%	2.3%
King's Lynn	0.0%	0.0%	0.0%	0.0%	12.9%	0.2%
Downham Market	0.0%	0.0%	0.0%	0.0%	2.5%	0.2%
Thetford	3.8%	0.0%	59.6%	17.5%	5.0%	12.2%
Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	7.1%
Norwich	0.0%	0.0%	3.8%	1.1%	1.0%	4.0%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
OTHER SHOPPING FACILITIES OUTSIDE DISTRICT	3.8%	1.6%	0.0%	1.7%	4.6%	1.7%
	75.5%	54.1%	86.5%	68.6%	90.1%	99.8%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

MARKET SHARES (£ million in 2008 prices):

Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)	TOTAL:
Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9	
						£91.4
£0.8	£5.7	£0.3	£6.8	£1.1	£0.1	£8.0
£0.1	£0.4	£0.0	£0.6	£0.0	£0.0	£0.6
£0.0	£0.0	£0.5	£0.5	£0.1	£0.0	£0.5
£0.6	£0.0	£0.3	£0.9	£0.1	£0.0	£0.9
£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
£0.3	£0.0	£0.0	£0.3	£0.0	£0.0	£0.3
£1.8	£6.1	£1.1	£9.0	£1.3	£0.1	£10.3
£3.8	£1.5	£1.8	£7.1	£1.0	£26.7	£34.9
£1.3	£5.4	£0.0	£6.7	£5.0	£9.5	£21.2
£0.0	£0.0	£0.0	£0.0	£2.2	£1.1	£3.3
£0.0	£0.0	£0.0	£0.0	£1.6	£0.1	£1.7
£0.0	£0.0	£0.0	£0.0	£0.3	£0.1	£0.4
£0.3	£0.0	£4.7	£5.0	£0.6	£6.1	£11.7
£0.0	£0.0	£0.0	£0.0	£0.0	£3.5	£3.5
£0.0	£0.0	£0.3	£0.3	£0.1	£2.0	£2.4
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
£0.3	£0.2	£0.0	£0.5	£0.6	£0.9	£1.9
£5.6	£7.2	£6.9	£19.6	£11.4	£50.0	£81.1
£7.4	£13.3	£7.9	£28.6	£12.7	£50.1	£91.4

TABLE 6: COMPARISON GOODS MARKET SHARES (%): SMALL GOODS FOR THE HOME

CENTRE / SHOPPING LOCATION	Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)
	Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£3.8	£6.6	£3.7	£14.1	£5.7	£24.2
FOREST HEATH DISTRICT:						
Newmarket Town Centre	19.7%	49.4%	3.6%	29.4%	12.4%	0.3%
Newmarket Out of Centre	1.3%	9.9%	0.0%	5.0%	0.0%	0.5%
Brandon	0.0%	0.0%	16.7%	4.4%	1.1%	0.2%
Mildenhall	19.7%	0.0%	4.8%	6.6%	2.1%	0.1%
Lakenheath	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
RAF Bases	1.3%	0.0%	0.0%	0.4%	0.0%	0.0%
	42.1%	59.3%	25.0%	45.7%	16.0%	1.1%
OUTSIDE DISTRICT:						
Bury St. Edmunds	46.1%	7.4%	9.5%	18.4%	5.7%	49.0%
Cambridge	7.9%	28.4%	0.0%	15.4%	16.3%	9.9%
Ely	0.0%	1.2%	0.0%	0.6%	36.2%	3.5%
King's Lynn	0.0%	0.0%	0.0%	0.0%	9.4%	0.1%
Downham Market	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%
Thetford	2.6%	0.0%	63.1%	17.2%	8.0%	13.4%
Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	18.6%
Norwich	0.0%	0.0%	1.2%	0.3%	0.4%	1.4%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
OTHER SHOPPING FACILITIES OUTSIDE DISTRICT	1.3%	3.7%	1.2%	2.4%	4.6%	2.3%
	57.9%	40.7%	75.0%	54.3%	84.0%	98.9%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

MARKET SHARES (£ million in 2008 prices):

Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)	TOTAL:
Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9	
						£43.9
£0.8	£3.3	£0.1	£4.1	£0.7	£0.1	£4.9
£0.1	£0.7	£0.0	£0.7	£0.0	£0.1	£0.8
£0.0	£0.0	£0.6	£0.6	£0.1	£0.1	£0.7
£0.8	£0.0	£0.2	£0.9	£0.1	£0.0	£1.1
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1
£1.6	£3.9	£0.9	£6.4	£0.9	£0.3	£7.6
£1.8	£0.5	£0.4	£2.6	£0.3	£11.9	£14.8
£0.3	£1.9	£0.0	£2.2	£0.9	£2.4	£5.5
£0.0	£0.1	£0.0	£0.1	£2.0	£0.8	£3.0
£0.0	£0.0	£0.0	£0.0	£0.5	£0.0	£0.6
£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.2
£0.1	£0.0	£2.3	£2.4	£0.5	£3.2	£6.1
£0.0	£0.0	£0.0	£0.0	£0.0	£4.5	£4.5
£0.0	£0.0	£0.0	£0.0	£0.0	£0.3	£0.4
£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
£0.1	£0.2	£0.0	£0.3	£0.3	£0.6	£1.2
£2.2	£2.7	£2.8	£7.7	£4.8	£23.9	£36.3
£3.8	£6.6	£3.7	£14.1	£5.7	£24.2	£43.9

TABLE 7: COMPARISON GOODS MARKET SHARES (%): LARGE DOMESTIC ELECTRICAL ITEMS

CENTRE / SHOPPING LOCATION	Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)
	Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£2.1	£3.9	£2.6	£8.7	£3.3	£15.0
FOREST HEATH DISTRICT:						
Newmarket Town Centre	6.3%	20.5%	0.0%	10.8%	6.1%	0.6%
Newmarket Out of Centre	1.6%	1.4%	0.0%	1.0%	2.0%	0.0%
Brandon	0.0%	0.0%	15.4%	4.7%	1.2%	0.0%
Mildenhall	23.8%	0.0%	6.4%	7.8%	2.4%	0.0%
Lakenheath	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%
RAF Bases	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	31.7%	21.9%	21.8%	24.3%	12.2%	0.6%
OUTSIDE DISTRICT:						
Bury St. Edmunds	52.4%	21.9%	20.5%	29.0%	15.5%	48.2%
Cambridge	12.7%	53.4%	1.3%	27.6%	36.4%	16.9%
Ely	0.0%	0.0%	0.0%	0.0%	10.5%	1.8%
King's Lynn	0.0%	0.0%	0.0%	0.0%	11.2%	0.1%
Downham Market	0.0%	0.0%	0.0%	0.0%	0.4%	0.3%
Thetford	3.2%	0.0%	53.8%	17.1%	5.4%	14.6%
Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	12.8%
Norwich	0.0%	0.0%	1.3%	0.4%	0.8%	1.6%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
OTHER SHOPPING FACILITIES OUTSIDE DISTRICT	0.0%	2.7%	1.3%	1.6%	7.5%	2.5%
	68.3%	78.1%	78.2%	75.7%	87.8%	99.4%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

MARKET SHARES (£ million in 2008 prices):

Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)	TOTAL:
Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9	
						£27.0
£0.1	£0.8	£0.0	£0.9	£0.2	£0.1	£1.2
£0.0	£0.1	£0.0	£0.1	£0.1	£0.0	£0.2
£0.0	£0.0	£0.4	£0.4	£0.0	£0.0	£0.4
£0.5	£0.0	£0.2	£0.7	£0.1	£0.0	£0.8
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
£0.7	£0.9	£0.6	£2.1	£0.4	£0.1	£2.6
£1.1	£0.9	£0.5	£2.5	£0.5	£7.2	£10.3
£0.3	£2.1	£0.0	£2.4	£1.2	£2.5	£6.1
£0.0	£0.0	£0.0	£0.0	£0.3	£0.3	£0.6
£0.0	£0.0	£0.0	£0.0	£0.4	£0.0	£0.4
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
£0.1	£0.0	£1.4	£1.5	£0.2	£2.2	£3.8
£0.0	£0.0	£0.0	£0.0	£0.0	£1.9	£1.9
£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.3
£0.0	£0.0	£0.0	£0.0	£0.0	£0.1	£0.1
£0.0	£0.1	£0.0	£0.1	£0.2	£0.4	£0.8
£1.5	£3.1	£2.1	£6.6	£2.9	£14.9	£24.4
£2.1	£3.9	£2.6	£8.7	£3.3	£15.0	£27.0

TABLE 8: MARKET SHARES (%): PETS AND PET RELATED

CENTRE / SHOPPING LOCATION	Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)
	Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£1.5	£2.7	£1.4	£5.6	£2.4	£9.5
FOREST HEATH DISTRICT:						
Newmarket Town Centre	20.0%	75.0%	0.0%	41.7%	8.8%	2.7%
Newmarket Out of Centre	10.9%	6.7%	0.0%	6.2%	5.0%	0.7%
Brandon	0.0%	0.0%	26.3%	6.5%	2.4%	0.0%
Mildenhall	21.8%	0.0%	7.9%	7.9%	1.5%	0.2%
Lakenheath	0.0%	0.0%	2.6%	0.6%	0.6%	0.0%
RAF Bases	3.6%	0.0%	0.0%	1.0%	0.0%	0.0%
	56.4%	81.7%	36.8%	63.8%	18.3%	3.6%
OUTSIDE DISTRICT:						
Bury St. Edmunds	32.7%	3.3%	21.1%	15.7%	3.3%	42.3%
Cambridge	0.0%	3.3%	0.0%	1.6%	2.1%	7.0%
Ely	0.0%	3.3%	0.0%	1.6%	22.0%	4.5%
King's Lynn	0.0%	0.0%	0.0%	0.0%	3.0%	0.2%
Downham Market	0.0%	0.0%	0.0%	0.0%	9.0%	0.2%
Thetford	5.5%	0.0%	36.8%	10.5%	9.6%	14.2%
Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	18.7%
Norwich	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%
OTHER SHOPPING FACILITIES OUTSIDE DISTRICT	5.5%	8.3%	5.3%	6.8%	32.8%	7.5%
	43.6%	18.3%	63.2%	36.2%	81.8%	96.4%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

MARKET SHARES (£ million in 2008 prices):

Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)	TOTAL:
Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9	
						£17.4
£0.3	£2.0	£0.0	£2.3	£0.2	£0.3	£2.8
£0.2	£0.2	£0.0	£0.3	£0.1	£0.1	£0.5
£0.0	£0.0	£0.4	£0.4	£0.1	£0.0	£0.4
£0.3	£0.0	£0.1	£0.4	£0.0	£0.0	£0.5
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.1
£0.1	£0.0	£0.0	£0.1	£0.0	£0.0	£0.1
£0.9	£2.2	£0.5	£3.5	£0.4	£0.3	£4.3
£0.5	£0.1	£0.3	£0.9	£0.1	£4.0	£4.9
£0.0	£0.1	£0.0	£0.1	£0.0	£0.7	£0.8
£0.0	£0.1	£0.0	£0.1	£0.5	£0.4	£1.0
£0.0	£0.0	£0.0	£0.0	£0.1	£0.0	£0.1
£0.0	£0.0	£0.0	£0.0	£0.2	£0.0	£0.2
£0.1	£0.0	£0.5	£0.6	£0.2	£1.3	£2.2
£0.0	£0.0	£0.0	£0.0	£0.0	£1.8	£1.8
£0.0	£0.0	£0.0	£0.0	£0.0	£0.0	£0.0
£0.0	£0.0	£0.0	£0.0	£0.0	£0.2	£0.2
£0.1	£0.2	£0.1	£0.4	£0.8	£0.7	£1.9
£0.7	£0.5	£0.9	£2.0	£2.0	£9.1	£13.1
£1.5	£2.7	£1.4	£5.6	£2.4	£9.5	£17.4

TABLE 9: COMPARISON GOODS MARKET SHARES (%): ALL OTHER NON-FOOD GOODS (including chemists, personal items, jewelry, books, stationary, games%toys, books, stationary, hobby items, sports & recreational goods)

CENTRE / SHOPPING LOCATION	Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)
	Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9
TOTAL AVAILABLE EXPENDITURE (£m):	£24.3	£41.9	£24.3	£90.5	£36.3	£156.1
FOREST HEATH DISTRICT:						
Newmarket Town Centre	17.5%	67.6%	2.8%	36.7%	13.0%	1.4%
Newmarket Out of Centre	3.5%	0.0%	0.0%	0.9%	1.0%	0.0%
Brandon	0.0%	0.0%	16.9%	4.5%	0.4%	0.0%
Mildenhall	10.5%	0.0%	1.4%	3.2%	0.4%	0.2%
Lakenheath	0.0%	0.0%	1.4%	0.4%	0.9%	0.0%
RAF Bases	1.8%	0.0%	0.0%	0.5%	0.0%	0.0%
	33.3%	67.6%	22.5%	46.3%	15.8%	1.6%
OUTSIDE DISTRICT:						
Bury St. Edmunds	47.4%	12.2%	39.4%	28.9%	6.8%	49.7%
Cambridge	14.0%	13.5%	5.6%	11.5%	8.8%	13.1%
Ely	1.8%	1.4%	1.4%	1.5%	34.6%	3.2%
King's Lynn	0.0%	0.0%	1.4%	0.4%	7.3%	0.4%
Downham Market	0.0%	0.0%	0.0%	0.0%	6.4%	0.0%
Thetford	0.0%	0.0%	29.6%	7.9%	1.7%	9.2%
Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%	11.0%
Norwich	1.8%	0.0%	0.0%	0.5%	2.8%	4.5%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
OTHER SHOPPING FACILITIES OUTSIDE DISTRICT	1.8%	5.4%	0.0%	3.0%	15.9%	6.7%
	66.7%	32.4%	77.5%	53.7%	84.2%	98.4%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

MARKET SHARES (£ million in 2008 prices):

Core Catchment Area (CCA)			Core Catchment Area (CCA)	Secondary Catchment Area (SCA)	Outer Catchment Area (OCA)	TOTAL:
Zone 1	Zone 2	Zone 3	Subtotal Zones 1-3	Zones 4 & 10	Zones 5, 6, 7, 8 & 9	
						£282.9
£4.3	£28.3	£0.7	£33.3	£4.7	£2.2	£40.1
£0.9	£0.0	£0.0	£0.9	£0.4	£0.0	£1.2
£0.0	£0.0	£4.1	£4.1	£0.2	£0.0	£4.3
£2.6	£0.0	£0.3	£2.9	£0.2	£0.3	£3.3
£0.0	£0.0	£0.3	£0.3	£0.3	£0.0	£0.7
£0.4	£0.0	£0.0	£0.4	£0.0	£0.0	£0.4
£8.1	£28.3	£5.5	£41.9	£5.7	£2.4	£50.0
£11.5	£5.1	£9.6	£26.2	£2.5	£77.6	£106.2
£3.4	£5.7	£1.4	£10.4	£3.2	£20.4	£34.1
£0.4	£0.6	£0.3	£1.3	£12.5	£4.9	£18.8
£0.0	£0.0	£0.3	£0.3	£2.6	£0.7	£3.6
£0.0	£0.0	£0.0	£0.0	£2.3	£0.0	£2.3
£0.0	£0.0	£7.2	£7.2	£0.6	£14.4	£22.3
£0.0	£0.0	£0.0	£0.0	£0.0	£17.2	£17.2
£0.4	£0.0	£0.0	£0.4	£1.0	£7.0	£8.4
£0.0	£0.0	£0.0	£0.0	£0.0	£1.0	£1.0
£0.4	£2.3	£0.0	£2.7	£5.8	£10.5	£18.9
£16.2	£13.6	£18.8	£48.6	£30.5	£153.7	£232.9
£24.3	£41.9	£24.3	£90.5	£36.3	£156.1	£282.9

FOREST HEATH DISTRICT COUNCIL

2011 RETAIL STUDY UPDATE

Convenience Goods Capacity Assessment

'Baseline' Scenario:

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2011 - 2031)

GROWTH (%)

ZONE:	2011	2016	2021	2026	2031	2010 - 31	
Zone 1:	26,213	27,624	28,990	30,273	31,553	20.4%	
Zone 2:	41,213	43,803	46,234	48,336	50,300	22.0%	
Zone 3:	28,963	30,855	32,658	34,365	36,075	24.6%	
Zone 4:	28,173	30,462	32,711	34,683	36,545	29.7%	
Zone 5:	14,056	15,036	16,079	17,114	18,069	28.6%	
Zone 6:	56,338	58,978	61,972	64,850	67,650	20.1%	
Zone 7:	13,811	13,909	14,038	14,176	14,290	3.5%	
Zone 8:	44,544	46,989	49,409	51,665	53,990	21.2%	
Zone 9:	29,871	32,032	34,078	35,924	37,649	26.0%	
Zone 10:	10,376	10,980	11,595	12,173	12,741	22.8%	
TOTAL:	293,558	310,668	327,765	343,559	358,862	22.2%	
Zones 1-3	'CORE' CATCHMENT AREA (CCA):	96,389	102,282	107,883	112,974	117,928	22.3%
Zones 4&10	'SECONDARY' CATCHMENT AREA (SCA):	38,549	41,442	44,306	46,856	49,286	27.9%
Zones 5-9	'OUTER CATCHMENT' AREA (OCA):	158,620	166,944	175,576	183,729	191,648	20.8%

Sources: Experian Business Strategies 'Retail Area Planner' Report for each study zone. Communal populations in Zones 1 and 3 have been discounted by 4.05% and 3.15% respectively (in accordance with 2010 Experian Reports for each survey zone) to "ring fence" residents of the District's RAF bases.

Notes: Base year population derived from Experian Revised Population Estimates 2010

Projections are based on Experian's revised 'demographic component model'. This takes into account 2010 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas and London Boroughs and what would happen if half the Local Housing Plans came to fruition. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.

TABLE 2: EXPENDITURE PER CAPITA FORECASTS (2010 prices)

ZONE:	2011	2016	2021	2026	2031
Zone 1:	£1,712	£1,709	£1,750	£1,793	£1,844
Zone 2:	£1,899	£1,896	£1,941	£1,989	£2,045
Zone 3:	£1,645	£1,642	£1,681	£1,723	£1,771
Zone 4:	£1,781	£1,777	£1,820	£1,865	£1,918
Zone 5:	£1,714	£1,710	£1,751	£1,795	£1,845
Zone 6:	£1,766	£1,762	£1,804	£1,849	£1,901
Zone 7:	£2,052	£2,048	£2,097	£2,149	£2,210
Zone 8:	£1,861	£1,857	£1,902	£1,949	£2,004
Zone 9:	£1,932	£1,928	£1,975	£2,024	£2,081
Zone 10:	£1,868	£1,865	£1,909	£1,957	£2,012

Sources: Average spend per capita estimates for 2011 are derived from Experian 'Retail Area Planner' Reports.

& Notes: Annual expenditure growth forecasts informed by Experian Business Strategies - Retail Planner Briefing Note 9 (September 2011)

Expenditure on SFT has been deducted at the outset, based on research by Experian Business Strategies (Retail Planning Briefing Notes).

TABLE 3: TOTAL FORECAST GROWTH IN CONVENIENCE GOODS EXPENDITURE, 2011 - 2031 (£ million)

GROWTH (%)

ZONE:	2011	2016	2021	2026	2031	2010 - 31	
Zone 1:	£44.9	£47.2	£50.7	£54.3	£58.2	29.6%	
Zone 2:	£78.3	£83.0	£89.7	£96.2	£102.9	31.4%	
Zone 3:	£47.6	£50.7	£54.9	£59.2	£63.9	34.1%	
Zone 4:	£50.2	£54.1	£59.5	£64.7	£70.1	39.7%	
Zone 5:	£24.1	£25.7	£28.2	£30.7	£33.3	38.4%	
Zone 6:	£99.5	£103.9	£111.8	£119.9	£128.6	29.3%	
Zone 7:	£28.3	£28.5	£29.4	£30.5	£31.6	11.4%	
Zone 8:	£82.9	£87.3	£94.0	£100.7	£108.2	30.5%	
Zone 9:	£57.7	£61.8	£67.3	£72.7	£78.3	35.7%	
Zone 10:	£19.4	£20.5	£22.1	£23.8	£25.6	32.2%	
TOTAL:	£532.9	£562.7	£607.7	£652.7	£700.7	31.5%	
Zones 1-3	'CORE' CATCHMENT AREA (CCA):	£170.8	£180.9	£195.4	£209.6	£225.0	31.7%
Zones 4&10	'SECONDARY' CATCHMENT AREA (SCA):	£69.6	£74.6	£81.7	£88.5	£95.7	37.6%
Zones 5-9	'OUTER CATCHMENT' AREA (OCA):	£292.5	£307.2	£330.7	£354.5	£380.1	29.9%

Source: Expenditure calculated from Tables 1 & 2.

FOREST HEATH DISTRICT COUNCIL

2011 RETAIL STUDY UPDATE

Convenience Goods Capacity Assessment

'Baseline' Scenario:

TABLE 4: EXISTING CONVENIENCE GOODS FLOORSPACE & ESTIMATED 'BENCHMARK' TURNOVER LEVELS

Estimated Conv Sales Area		Average Sales Density	2011	2016	2021	2026	2031
(m ² net)		(£ per m ²)					
NEWMARKET TOWN CENTRE							
Waitrose (Fred Archer Way)	1,847	(5) £11,500	£21.2	£21.4	£21.7	£22.0	£22.4
Iceland (Crown Walk)	488	(2) £6,350	£3.1	£3.1	£3.2	£3.2	£3.3
Marks & Spencer (The Guineas)	151	(2) £11,500	£1.7	£1.8	£1.8	£1.8	£1.8
All Other Local Shops/Market	1,220	(4) £3,000	£3.7	£3.7	£3.7	£3.8	£3.9
SUB-TOTAL	3,707	£8,024	£29.7	£30.0	£30.4	£30.8	£31.3
BRANDON TOWN CENTRE							
Aldi (High Street)	1,082	(6) £4,500	£4.9	£4.9	£5.0	£5.0	£5.1
All Other Local Shops/Market	646	(3) £2,000	£1.3	£1.3	£1.3	£1.3	£1.4
SUB-TOTAL	1,728	£3,565	£6.2	£6.2	£6.3	£6.4	£6.5
MILDENHALL TOWN CENTRE							
Sainsbury's (Recreation Way)	1,843	(7) £11,000	£20.3	£20.4	£20.7	£21.0	£21.3
Co-Op (Kings Street)	525	(2) £7,250	£3.8	£3.8	£3.9	£3.9	£4.0
All Other Local Shops/Market	740	(2) £2,000	£1.5	£1.5	£1.5	£1.5	£1.6
SUB-TOTAL	3,109	£8,224	£25.6	£25.8	£26.1	£26.5	£26.9
LOCAL CENTRES							
Lakenheath	307	(3) £1,500	£0.5	£0.5	£0.5	£0.5	£0.5
All Other Local Centres	0	(3) £1,500	£0.0	£0.0	£0.0	£0.0	£0.0
SUB-TOTAL	307	£1,500	£0.5	£0.5	£0.5	£0.5	£0.5
OUT-OF-CENTRE							
Tesco, Fordham Road (Newmarket)	2,281	(8) £13,500	£30.8	£31.0	£31.4	£31.9	£32.4
Asda, Studlands RP (Newmarket)	770	(1) £15,500	£11.9	£12.0	£12.2	£12.4	£12.6
Tesco, London Road (Brandon)	922	(1) £13,500	£12.4	£12.5	£12.7	£12.9	£13.1
SUB-TOTAL	3,972	£13,887	£55.2	£55.6	£56.3	£57.2	£58.0
TOTAL:	12,822	£9,132	£117.1	£118.0	£119.6	£121.4	£123.2

Notes: Average sales density for convenience goods derived from UK Mintel Retail Rankings 2010, grown to each assessment year assuming an annual productivity growth rate of 0% per annum between 2011-2012, 0.2% pa in 2013, 0.2% pa between 2014-2018 and 0.3% pa between 2019-31.
Sales densities do not include VAT or sale from "other" goods (Petrol, Cafe, Pharmacy, etc)
Turnover for "all other convenience floorspace" taken as SP estimate.

Sources: (1) Taken from recent planning applications for Tesco Extension (reference F/2011/0095/FUL). NB: No restriction on comparison goods. S106 does not allow land to be used as a
(2) Derived from 2006 Retail Study
(3) Estimate based on SP survey of centres and all available information.
(4) Experian Goad Centre Report for Newmarket (2011)
(5) Planning application reference F/2001/0528. Condition 8 restricts comparison sales to 25% of total net sales area.
(6) Planning application reference F/2006/0523/FUL. No restriction on comparison goods floorspace.
(7) Planning application reference F/2008/0268/FUL. No restriction on comparison goods floorspace.
(8) Planning application reference F/2001/395.

TABLE 5: NEW RETAIL FLOORSPACE PIPELINE (ie. forthcoming/live planning applications, planning permissions and developments under construction)

Estimated Conv Sales Area		Average Sales Density	2011	2016	2021	2026	2031
(m ² net)		(£ per m ²)					
Tesco, Lakenheath (1)							
Convenience Goods:	1,194	£13,500	£16.1	£16.2	£16.4	£16.7	£16.9
FOREST HEATH DISTRICT AREA			£16.1	£16.2	£16.4	£16.7	£16.9

Notes: Assume 'productivity' growth rate of 0% per annum between 2011-2012, 0.2% pa in 2013, 0.2% pa between 2014-2018 and 0.3% pa between 2019-31.
(1) Planning application reference F/2010/0338/FUL.

Source: Forest Heath District Council

FOREST HEATH DISTRICT COUNCIL

2011 RETAIL STUDY UPDATE

Convenience Goods Capacity Assessment

'Baseline' Scenario:

TABLE 6: 'CORE' CATCHMENT AREA (Zones 1 - 3) - MARKET SHARE ANALYSIS

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE					
Waitrose (Fred Archer Way)	10.7%	10.7%	10.7%	10.7%	10.7%
Iceland (Crown Walk)	1.1%	1.1%	1.1%	1.1%	1.1%
Marks & Spencer (The Guineas)	1.2%	1.2%	1.2%	1.2%	1.2%
All other convenience floorspace	1.3%	1.3%	1.3%	1.3%	1.3%
NEWMARKET TC:	14.4%	14.4%	14.4%	14.4%	14.4%
BRANDON TOWN CENTRE					
Aldi (High Street)	4.1%	4.1%	4.1%	4.1%	4.1%
All Other Local Shops/Market	0.6%	0.6%	0.6%	0.6%	0.6%
BRANDON TC:	4.7%	4.7%	4.7%	4.7%	4.7%
MILDENHALL TOWN CENTRE					
Sainsbury's (Recreation Way)	11.8%	11.8%	11.8%	11.8%	11.8%
Co-Op (Kings Street)	1.6%	1.6%	1.6%	1.6%	1.6%
All Other Local Shops/Market	0.3%	0.3%	0.3%	0.3%	0.3%
MILDENHALL TC:	13.7%	13.7%	13.7%	13.7%	13.7%
LOCAL CENTRES					
Lakenheath Local Centre	2.0%	2.0%	2.0%	2.0%	2.0%
LOCAL CENTRES:	2.0%	2.0%	2.0%	2.0%	2.0%
OUT-OF-CENTRE					
Tesco, Fordham Road (Newmarket)	26.4%	26.4%	26.4%	26.4%	26.4%
Netto, Studlands Retail Park (Newmarket)	2.9%	2.9%	2.9%	2.9%	2.9%
Tesco, London Road (Brandon)	6.3%	6.3%	6.3%	6.3%	6.3%
RAF Bases	0.0%	0.0%	0.0%	0.0%	0.0%
All Other Floorspace	0.9%	0.9%	0.9%	0.9%	0.9%
OUT-OF-CENTRE:	36.5%	36.5%	36.5%	36.5%	36.5%
DISTRICT AREA SUBTOTAL:	71.3%	71.3%	71.3%	71.3%	71.3%
ALL CENTRES AND STORES OUTSIDE DISTRICT					
Bury St. Edmunds	8.3%	8.3%	8.3%	8.3%	8.3%
Cambridge	2.0%	2.0%	2.0%	2.0%	2.0%
Ely	1.4%	1.4%	1.4%	1.4%	1.4%
King's Lynn	0.0%	0.0%	0.0%	0.0%	0.0%
Downham Market	0.2%	0.2%	0.2%	0.2%	0.2%
Thetford	13.1%	13.1%	13.1%	13.1%	13.1%
Haverhill	1.3%	1.3%	1.3%	1.3%	1.3%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%
All Other Floorspace	2.3%	2.3%	2.3%	2.3%	2.3%
ALL CENTRES & STORES OUTSIDE DISTRICT SUBTOTAL:	28.7%	28.7%	28.7%	28.7%	28.7%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Results of NEMS Household Telephone Interview Survey (September 2011) commissioned by Strategic Perspectives.

Notes: Assumes that main food shopping constitutes 65% of total convenience expenditure, secondary shopping 15% and top-up shopping 20%

All calculations derived on the basis of individual survey zones, aggregated into catchment areas (CCA, SCA or OCA) for reporting purposes.

FOREST HEATH DISTRICT COUNCIL

2011 RETAIL STUDY UPDATE

Convenience Goods Capacity Assessment

'Baseline' Scenario:

TABLE 7: 'SECONDARY' CATCHMENT AREA (SCA) (Zones 4 & 10) - MARKET SHARE ANALYSIS

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE					
Waitrose (Fred Archer Way)	5.0%	5.0%	5.0%	5.0%	5.0%
Iceland (Crown Walk)	0.1%	0.1%	0.1%	0.1%	0.1%
Marks & Spencer (The Guineas)	0.1%	0.1%	0.1%	0.1%	0.1%
All other convenience floorspace	0.1%	0.1%	0.1%	0.1%	0.1%
NEWMARKET TC:	5.4%	5.4%	5.4%	5.4%	5.4%
BRANDON TOWN CENTRE					
Aldi (High Street)	2.8%	2.8%	2.8%	2.8%	2.8%
All Other Local Shops/Market	0.2%	0.2%	0.2%	0.2%	0.2%
BRANDON TC:	3.0%	3.0%	3.0%	3.0%	3.0%
MILDENHALL TOWN CENTRE					
Sainsbury's (Recreation Way)	2.8%	2.8%	2.8%	2.8%	2.8%
Co-Op (Kings Street)	0.0%	0.0%	0.0%	0.0%	0.0%
All Other Local Shops/Market	0.0%	0.0%	0.0%	0.0%	0.0%
MILDENHALL TC:	2.8%	2.8%	2.8%	2.8%	2.8%
LOCAL CENTRES					
Lakenheath Local Centre	0.5%	0.5%	0.5%	0.5%	0.5%
LOCAL CENTRES:	0.5%	0.5%	0.5%	0.5%	0.5%
OUT-OF-CENTRE					
Tesco, Fordham Road (Newmarket)	10.5%	10.5%	10.5%	10.5%	10.5%
Netto, Studlands Retail Park (Newmarket)	1.5%	1.5%	1.5%	1.5%	1.5%
Tesco, London Road (Brandon)	1.3%	1.3%	1.3%	1.3%	1.3%
RAF Bases	0.0%	0.0%	0.0%	0.0%	0.0%
All Other Floorspace	0.2%	0.2%	0.2%	0.2%	0.2%
OUT-OF-CENTRE:	13.6%	13.6%	13.6%	13.6%	13.6%
DISTRICT AREA SUBTOTAL:	25.3%	25.3%	25.3%	25.3%	25.3%
ALL CENTRES AND STORES OUTSIDE DISTRICT					
Bury St. Edmunds	2.6%	2.6%	2.6%	2.6%	2.6%
Cambridge	0.9%	0.9%	0.9%	0.9%	0.9%
Ely	31.1%	31.1%	31.1%	31.1%	31.1%
King's Lynn	1.8%	1.8%	1.8%	1.8%	1.8%
Downham Market	9.2%	9.2%	9.2%	9.2%	9.2%
Thetford	6.4%	6.4%	6.4%	6.4%	6.4%
Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%
All Other Floorspace	22.8%	22.8%	22.8%	22.8%	22.8%
ALL CENTRES & STORES OUTSIDE DISTRICT SUBTOTAL:	74.7%	74.7%	74.7%	74.7%	74.7%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Results of NEMS Household Telephone Interview Survey (September 2011) commissioned by Strategic Perspectives.

Notes: Assumes that main food shopping constitutes 65% of total convenience expenditure, secondary shopping 10% and top-up shopping 15%
All calculations derived on the basis of individual survey zones, aggregated into catchment areas (CCA, SCA or OCA) for reporting purposes.

FOREST HEATH DISTRICT COUNCIL

2011 RETAIL STUDY UPDATE

Convenience Goods Capacity Assessment

'Baseline' Scenario:

TABLE 8: 'OUTER' CATCHMENT AREA (Zones 5 - 9) - MARKET SHARE ANALYSIS

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE					
Waitrose (Fred Archer Way)	1.0%	1.0%	1.0%	1.0%	1.0%
Iceland (Crown Walk)	0.1%	0.1%	0.1%	0.1%	0.1%
Marks & Spencer (The Guineas)	0.0%	0.0%	0.0%	0.0%	0.0%
All other convenience floorspace	0.2%	0.2%	0.2%	0.2%	0.2%
NEWMARKET TC:	1.3%	1.3%	1.3%	1.3%	1.3%
BRANDON TOWN CENTRE					
Aldi (High Street)	0.4%	0.4%	0.4%	0.4%	0.4%
All Other Local Shops/Market	0.0%	0.0%	0.0%	0.0%	0.0%
BRANDON TC:	0.4%	0.4%	0.4%	0.4%	0.4%
MILDENHALL TOWN CENTRE					
Sainsbury's (Recreation Way)	0.1%	0.1%	0.1%	0.1%	0.1%
Co-Op (Kings Street)	0.0%	0.0%	0.0%	0.0%	0.0%
All Other Local Shops/Market	0.0%	0.0%	0.0%	0.0%	0.0%
MILDENHALL TC:	0.1%	0.1%	0.1%	0.1%	0.1%
LOCAL CENTRES					
Lakenheath Local Centre	0.1%	0.1%	0.1%	0.1%	0.1%
LOCAL CENTRES:	0.1%	0.1%	0.1%	0.1%	0.1%
OUT-OF-CENTRE					
Tesco, Fordham Road (Newmarket)	0.7%	0.7%	0.7%	0.7%	0.7%
Netto, Studlands Retail Park (Newmarket)	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, London Road (Brandon)	0.1%	0.1%	0.1%	0.1%	0.1%
RAF Bases	0.0%	0.0%	0.0%	0.0%	0.0%
All Other Floorspace	0.0%	0.0%	0.0%	0.0%	0.0%
OUT-OF-CENTRE:	0.8%	0.8%	0.8%	0.8%	0.8%
DISTRICT AREA SUBTOTAL:	2.7%	2.7%	2.7%	2.7%	2.7%
ALL CENTRES AND STORES OUTSIDE DISTRICT					
Bury St. Edmunds	33.3%	33.3%	33.3%	33.3%	33.3%
Cambridge	4.4%	4.4%	4.4%	4.4%	4.4%
Ely	9.9%	9.9%	9.9%	9.9%	9.9%
King's Lynn	0.3%	0.3%	0.3%	0.3%	0.3%
Downham Market	0.2%	0.2%	0.2%	0.2%	0.2%
Thetford	11.5%	11.5%	11.5%	11.5%	11.5%
Haverhill	26.7%	26.7%	26.7%	26.7%	26.7%
Sudbury	1.1%	1.1%	1.1%	1.1%	1.1%
All Other Floorspace	9.8%	9.8%	9.8%	9.8%	9.8%
ALL CENTRES & STORES OUTSIDE DISTRICT SUBTOTAL:	97.3%	97.3%	97.3%	97.3%	97.3%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Results of NEMS Household Telephone Interview Survey (September 2011) commissioned by Strategic Perspectives.

Notes: Assumes that main food shopping constitutes 65% of total convenience expenditure, secondary shopping 10% and top-up shopping 15%

All calculations derived on the basis of individual survey zones, aggregated into catchment areas (CCA, SCA or OCA) for reporting purposes.

FOREST HEATH DISTRICT COUNCIL

2011 RETAIL STUDY UPDATE

Convenience Goods Capacity Assessment

'Baseline' Scenario:

TABLE 9: CONVENIENCE GOODS TURNOVER DERIVED FROM 'CORE' CATCHMENT AREA (ZONES 1-3)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE					
Waitrose (Fred Archer Way)	£18.3	£19.4	£21.0	£22.5	£24.2
Iceland (Crown Walk)	£1.9	£2.1	£2.2	£2.4	£2.6
Marks & Spencer (The Guineas)	£2.0	£2.1	£2.3	£2.5	£2.7
All other convenience floorspace	£2.3	£2.4	£2.6	£2.8	£3.0
NEWMARKET TC:	£24.6	£26.0	£28.1	£30.2	£32.4
BRANDON TOWN CENTRE					
Aldi (High Street)	£7.0	£7.4	£8.0	£8.6	£9.2
All Other Local Shops/Market	£1.0	£1.1	£1.1	£1.2	£1.3
BRANDON TC:	£8.0	£8.5	£9.2	£9.8	£10.6
MILDENHALL TOWN CENTRE					
Sainsbury's (Recreation Way)	£20.1	£21.3	£23.0	£24.7	£26.5
Co-Op (Kings Street)	£2.7	£2.9	£3.1	£3.4	£3.6
All Other Local Shops/Market	£0.5	£0.6	£0.6	£0.7	£0.7
DISTRICT CENTRES:	£23.4	£24.8	£26.8	£28.7	£30.8
LOCAL CENTRES					
Lakenheath Local Centre	£3.4	£3.6	£3.9	£4.2	£4.5
LOCAL CENTRES:	£3.4	£3.6	£3.9	£4.2	£4.5
OUT-OF-CENTRE					
Tesco, Fordham Road (Newmarket)	£45.1	£47.8	£51.6	£55.4	£59.4
Netto, Studlands Retail Park (Newmarket)	£5.0	£5.3	£5.7	£6.1	£6.6
Tesco, London Road (Brandon)	£10.7	£11.4	£12.3	£13.2	£14.1
RAF Bases	£0.0	£0.0	£0.0	£0.0	£0.0
All Other Floorspace	£1.5	£1.6	£1.7	£1.8	£2.0
OUT-OF-CENTRE:	£62.3	£66.0	£71.3	£76.5	£82.1
DISTRICT AREA SUBTOTAL:	£121.8	£128.9	£139.3	£149.4	£160.4
ALL CENTRES AND STORES OUTSIDE DISTRICT					
Bury St. Edmunds	£14.2	£15.0	£16.2	£17.4	£18.7
Cambridge	£3.5	£3.7	£4.0	£4.3	£4.6
Ely	£2.4	£2.5	£2.7	£2.9	£3.2
King's Lynn	£0.0	£0.0	£0.0	£0.0	£0.0
Downham Market	£0.3	£0.3	£0.3	£0.3	£0.4
Thetford	£22.4	£23.8	£25.7	£27.5	£29.6
Haverhill	£2.2	£2.4	£2.5	£2.7	£2.9
Sudbury	£0.0	£0.0	£0.0	£0.0	£0.0
All Other Floorspace	£4.0	£4.2	£4.6	£4.9	£5.3
ALL CENTRES & STORES OUTSIDE BOROUGH SUBTOTAL:	£49.0	£51.9	£56.1	£60.2	£64.6
TOTAL:	£170.8	£180.9	£195.4	£209.6	£225.0

Source: Derived from Tables 3 & 6.

Notes: All calculations derived on the basis of individual survey zones, aggregated into catchment areas (CCA, SCA or OCA) for reporting purposes.

FOREST HEATH DISTRICT COUNCIL

2011 RETAIL STUDY UPDATE

Convenience Goods Capacity Assessment

'Baseline' Scenario:

TABLE 10: CONVENIENCE GOODS TURNOVER DERIVED FROM 'SECONDARY' CATCHMENT AREA (ZONES 4 & 10)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE					
Waitrose (Fred Archer Way)	£3.5	£3.7	£4.1	£4.4	£4.8
Iceland (Crown Walk)	£0.1	£0.1	£0.1	£0.1	£0.1
Marks & Spencer (The Guineas)	£0.1	£0.1	£0.1	£0.1	£0.1
All other convenience floorspace	£0.1	£0.1	£0.1	£0.1	£0.1
NEWMARKET TC:	£3.8	£4.0	£4.4	£4.8	£5.2
BRANDON TOWN CENTRE					
Aldi (High Street)	£2.0	£2.1	£2.3	£2.5	£2.7
All Other Local Shops/Market	£0.1	£0.1	£0.1	£0.1	£0.2
BRANDON TC:	£2.1	£2.2	£2.5	£2.7	£2.9
MILDENHALL TOWN CENTRE					
Sainsbury's (Recreation Way)	£1.9	£2.1	£2.3	£2.4	£2.6
Co-Op (Kings Street)	£0.0	£0.0	£0.0	£0.0	£0.0
All Other Local Shops/Market	£0.0	£0.0	£0.0	£0.0	£0.0
MILDENHALL TC:	£1.9	£2.1	£2.3	£2.4	£2.6
LOCAL CENTRES					
Lakenheath Local Centre	£0.4	£0.4	£0.4	£0.5	£0.5
LOCAL CENTRES:	£0.4	£0.4	£0.4	£0.5	£0.5
OUT-OF-CENTRE					
Tesco, Fordham Road (Newmarket)	£7.3	£7.9	£8.6	£9.3	£10.1
Netto, Studlands Retail Park (Newmarket)	£1.0	£1.1	£1.2	£1.3	£1.4
Tesco, London Road (Brandon)	£0.9	£1.0	£1.1	£1.2	£1.3
RAF Bases	£0.0	£0.0	£0.0	£0.0	£0.0
All Other Floorspace	£0.1	£0.1	£0.1	£0.2	£0.2
OUT-OF-CENTRE:	£9.4	£10.1	£11.1	£12.0	£13.0
BOROUGH AREA SUBTOTAL:	£17.6	£18.9	£20.6	£22.4	£24.2
ALL CENTRES AND STORES OUTSIDE DISTRICT					
Bury St. Edmunds	£1.8	£1.9	£2.1	£2.3	£2.5
Cambridge	£0.7	£0.7	£0.8	£0.8	£0.9
Ely	£21.6	£23.2	£25.4	£27.5	£29.7
King's Lynn	£1.3	£1.4	£1.5	£1.6	£1.7
Downham Market	£6.4	£6.8	£7.5	£8.1	£8.8
Thetford	£4.4	£4.7	£5.2	£5.6	£6.1
Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0
Sudbury	£0.0	£0.0	£0.0	£0.0	£0.0
All Other Floorspace	£15.9	£17.0	£18.6	£20.2	£21.8
ALL CENTRES & STORES OUTSIDE DISTRICT SUBTOTAL:	£52.0	£55.8	£61.0	£66.1	£71.5
TOTAL:	£69.6	£74.6	£81.7	£88.5	£95.7

Source: Derived from Tables 3 & 7.

Notes: All calculations derived on the basis of individual survey zones, aggregated into catchment areas (CCA, SCA or OCA) for reporting purposes.

FOREST HEATH DISTRICT COUNCIL

2011 RETAIL STUDY UPDATE

Convenience Goods Capacity Assessment

'Baseline' Scenario:

TABLE 11: CONVENIENCE GOODS TURNOVER DERIVED FROM 'OUTER' CATCHMENT AREA (ZONES 5 - 9)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE					
Waitrose (Fred Archer Way)	£3.0	£3.1	£3.4	£3.6	£3.9
Iceland (Crown Walk)	£0.2	£0.2	£0.2	£0.2	£0.2
Marks & Spencer (The Guineas)	£0.0	£0.0	£0.0	£0.0	£0.0
All other convenience floorspace	£0.7	£0.7	£0.8	£0.8	£0.9
NEWMARKET TC:	£3.8	£4.0	£4.3	£4.7	£5.0
BRANDON TOWN CENTRE					
Aldi (High Street)	£1.2	£1.3	£1.4	£1.5	£1.6
All Other Local Shops/Market	£0.1	£0.1	£0.1	£0.1	£0.1
BRANDON TC:	£1.3	£1.4	£1.5	£1.6	£1.7
MILDENHALL TOWN CENTRE					
Sainsbury's (Recreation Way)	£0.0	£0.0	£0.0	£0.0	£0.0
Co-Op (Kings Street)	£0.3	£0.3	£0.3	£0.3	£0.4
All Other Local Shops/Market	£0.0	£0.0	£0.0	£0.0	£0.0
MILDENHALL TC:	£0.3	£0.3	£0.3	£0.3	£0.4
LOCAL CENTRES					
Lakenheath Local Centre	£0.2	£0.2	£0.2	£0.2	£0.2
LOCAL CENTRES:	£0.2	£0.2	£0.2	£0.2	£0.2
OUT-OF-CENTRE					
Tesco, Fordham Road (Newmarket)	£2.0	£2.1	£2.3	£2.4	£2.6
Netto, Studlands Retail Park (Newmarket)	£0.0	£0.0	£0.0	£0.0	£0.0
Tesco, London Road (Brandon)	£0.2	£0.2	£0.3	£0.3	£0.3
RAF Bases	£0.0	£0.0	£0.0	£0.0	£0.0
All Other Floorspace	£0.0	£0.0	£0.0	£0.0	£0.0
OUT-OF-CENTRE:	£2.2	£2.4	£2.5	£2.7	£2.9
DISTRICT AREA SUBTOTAL:	£7.9	£8.2	£8.9	£9.5	£10.2
ALL CENTRES AND STORES OUTSIDE DISTRICT					
Bury St. Edmunds	£97.5	£102.4	£110.2	£118.2	£126.7
Cambridge	£12.9	£13.5	£14.6	£15.6	£16.7
Ely	£29.0	£30.5	£32.8	£35.2	£37.7
King's Lynn	£1.0	£1.0	£1.1	£1.2	£1.3
Downham Market	£0.6	£0.7	£0.7	£0.8	£0.8
Thetford	£33.6	£35.3	£38.0	£40.8	£43.7
Haverhill	£78.1	£82.0	£88.3	£94.7	£101.5
Sudbury	£3.3	£3.5	£3.8	£4.0	£4.3
All Other Floorspace	£28.5	£30.0	£32.3	£34.6	£37.1
ALL CENTRES & STORES OUTSIDE DISTRICT SUBTOTAL:	£284.7	£298.9	£321.8	£345.0	£369.9
TOTAL:	£292.5	£307.2	£330.7	£354.5	£380.1

Source: Derived from Tables 3 & 8.

Notes: All calculations derived on the basis of individual survey zones, aggregated into catchment areas (CCA, SCA or OCA) for reporting purposes.

FOREST HEATH DISTRICT COUNCIL

2011 RETAIL STUDY UPDATE

Convenience Goods Capacity Assessment

'Baseline' Scenario:

TABLE 12: TOTAL TURNOVER DERIVED FROM STUDY AREA (Zones 1 - 10)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE					
Waitrose (Fred Archer Way)	£24.8	£26.3	£28.4	£30.5	£32.8
Iceland (Crown Walk)	£2.2	£2.3	£2.5	£2.7	£2.9
Marks & Spencer (The Guineas)	£2.1	£2.3	£2.4	£2.6	£2.8
All other convenience floorspace	£3.1	£3.2	£3.5	£3.8	£4.0
NEWMARKET TC:	£32.2	£34.1	£36.9	£39.6	£42.5
BRANDON TOWN CENTRE					
Aldi (High Street)	£10.2	£10.8	£11.7	£12.6	£13.6
All Other Local Shops/Market	£1.2	£1.3	£1.4	£1.5	£1.6
BRANDON TC:	£11.4	£12.1	£13.1	£14.1	£15.1
MILDENHALL TOWN CENTRE					
Sainsbury's (Recreation Way)	£22.3	£23.6	£25.6	£27.5	£29.5
Co-Op (Kings Street)	£2.7	£2.9	£3.1	£3.4	£3.6
All Other Local Shops/Market	£0.5	£0.6	£0.6	£0.7	£0.7
MILDENHALL TC:	£25.6	£27.1	£29.3	£31.5	£33.8
LOCAL CENTRES					
Lakenheath Local Centre	£4.0	£4.2	£4.6	£4.9	£5.3
LOCAL CENTRES:	£4.0	£4.2	£4.6	£4.9	£5.3
OUT-OF-CENTRE					
Tesco, Fordham Road (Newmarket)	£54.4	£57.7	£62.5	£67.1	£72.1
Asda Studlands Retail Park (Newmarket)	£6.0	£6.4	£6.9	£7.4	£8.0
Tesco, London Road (Brandon)	£11.9	£12.6	£13.6	£14.7	£15.7
All Other Floorspace	£1.6	£1.7	£1.8	£2.0	£2.1
OUT-OF-CENTRE:	£74.0	£78.5	£84.9	£91.2	£98.0
DISTRICT AREA SUBTOTAL:	£147.2	£156.0	£168.8	£181.3	£194.7
ALL CENTRES AND STORES OUTSIDE DISTRICT					
Bury St. Edmunds	£113.5	£119.4	£128.6	£137.9	£147.9
Cambridge	£17.0	£17.9	£19.3	£20.7	£22.2
Ely	£53.1	£56.2	£60.9	£65.6	£70.6
King's Lynn	£2.3	£2.4	£2.6	£2.8	£3.0
Downham Market	£7.3	£7.8	£8.5	£9.2	£10.0
Thetford	£60.5	£63.8	£68.9	£73.9	£79.4
Haverhill	£80.3	£84.4	£90.8	£97.4	£104.4
Sudbury	£3.3	£3.5	£3.8	£4.0	£4.3
All Other Floorspace	£48.4	£51.2	£55.4	£59.7	£64.2
ALL CENTRES & STORES OUTSIDE DISTRICT SUBTOTAL:	£385.7	£406.6	£438.9	£471.3	£506.0
TOTAL TURNOVER:	£532.9	£562.7	£607.7	£652.7	£700.7

Notes: All calculations derived on the basis of individual survey zones, aggregated into catchment areas (CCA, SCA or OCA) for reporting purposes.

FOREST HEATH DISTRICT COUNCIL

2011 RETAIL STUDY UPDATE

Convenience Goods Capacity Assessment

'Baseline' Scenario:

TABLE 13: ESTIMATED TRADE DRAW FROM OUTSIDE STUDY AREA (i.e. beyond Zones 1-10)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE	5.0%	5.0%	5.0%	5.0%	5.0%
BRANDON TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%
MILDENHALL TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%
ALL LOCAL CENTRES:	0.0%	0.0%	0.0%	0.0%	0.0%
FOREST HEATH OUT OF CENTRE STORES					
Tesco, Fordham Road (Newmarket)	0.0%	0.0%	0.0%	0.0%	0.0%
Netto, Studlands Retail Park (Newmarket)	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, London Road (Brandon)	0.0%	0.0%	0.0%	0.0%	0.0%
RAF Bases	0.0%	0.0%	0.0%	0.0%	0.0%
All Other Floorspace	0.0%	0.0%	0.0%	0.0%	0.0%

TABLE 14: TOTAL 'POTENTIAL' TURNOVER OF ALL CENTRES & SHOPPING LOCATIONS WITHIN STUDY AREA

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE					
Waitrose (Fred Archer Way)	£26.0	£27.6	£29.8	£32.1	£34.4
Iceland (Crown Walk)	£2.3	£2.5	£2.7	£2.9	£3.1
Marks & Spencer (The Guineas)	£2.2	£2.4	£2.6	£2.7	£2.9
All other convenience floorspace	£3.2	£3.4	£3.7	£3.9	£4.2
NEWMARKET TC:	£33.8	£35.8	£38.7	£41.6	£44.7
BRANDON TOWN CENTRE					
Aldi (High Street)	£10.2	£10.8	£12.3	£13.3	£14.2
All Other Local Shops/Market	£1.2	£1.3	£1.4	£1.5	£1.7
BRANDON TC:	£11.4	£12.1	£13.8	£14.8	£15.9
MILDENHALL TOWN CENTRE					
Sainsbury's (Recreation Way)	£22.3	£23.6	£25.6	£27.5	£29.5
Co-Op (Kings Street)	£2.7	£2.9	£3.1	£3.4	£3.6
All Other Local Shops/Market	£0.5	£0.6	£0.6	£0.7	£0.7
MILDENHALL TC:	£25.6	£27.1	£29.3	£31.5	£33.8
LOCAL CENTRES					
Lakenheath Local Centre	£4.0	£4.2	£4.6	£4.9	£5.3
LOCAL CENTRES:	£4.0	£4.2	£4.6	£4.9	£5.3
OUT-OF-CENTRE					
Tesco, Fordham Road (Newmarket)	£54.4	£57.7	£62.5	£67.1	£72.1
Netto, Studlands Retail Park (Newmarket)	£6.0	£6.4	£6.9	£7.4	£8.0
Tesco, London Road (Brandon)	£11.9	£12.6	£13.6	£14.7	£15.7
All Other Floorspace	£1.6	£1.7	£1.8	£2.0	£2.1
OUT-OF-CENTRE:	£74.0	£78.5	£84.9	£91.2	£98.0
DISTRICT AREA TOTAL TURNOVER	£148.8	£157.8	£171.3	£184.0	£197.6

Notes: All calculations derived on the basis of individual survey zones, aggregated into catchment areas (CCA, SCA or OCA) for reporting purposes.

FOREST HEATH DISTRICT COUNCIL

2011 RETAIL STUDY UPDATE

Convenience Goods Capacity Assessment

'Baseline' Scenario:

TABLE 15: FOREST HEATH DISTRICT COUNCIL - CONVENIENCE GOODS CAPACITY ASSESSMENT

	2011	2016	2021	2026	2031
STEP 1: TOTAL EXISTING FLOORSPACE IN DISTRICT (sqm net):	12,822	12,822	12,822	12,822	12,822
STEP 2: TOTAL FORECAST 'POTENTIAL' TURNOVER (£ m):					
(i) Total 'Potential' Turnover (£ million):	£148.79	£157.75	£171.28	£184.01	£197.63
(ii) Average Sales Density (£ per sq.m):	£11,604	£12,303	£13,358	£14,351	£15,413
STEP 3: TOTAL FORECAST 'BENCHMARK' TURNOVER (£ m):					
(i) Total 'Benchmark' Turnover (£ million):	£117.09	£118.03	£119.57	£121.37	£123.21
(ii) Average Sales Density (£ per sq.m):	£9,132	£9,205	£9,325	£9,466	£9,609
STEP 4: TOTAL FORECAST RESIDUAL EXPENDITURE:	£31.70	£39.72	£51.71	£62.63	£74.42
STEP 5: FORECAST TURNOVER OF COMMITTED FLOORSPACE (£ m):	£16.1	£16.2	£16.4	£16.7	£16.9
STEP 6: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	£15.6	£23.5	£35.3	£46.0	£57.5
STEP 7: FORECAST CAPACITY FOR NEW CONVENIENCE GOODS FLOORSPACE:					
CAPACITY FOR NEW SUPERSTORE (sq m):					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,096	£12,254	£12,439	£12,627
(ii) Net Floorspace Capacity (sq m):	1,299	1,941	2,880	3,696	4,555
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	1,855	2,773	4,115	5,280	6,506
CAPACITY FOR NEW SUPERMARKET / DEEP DISCOUNTER (sq m):					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,048	£6,127	£6,220	£6,313
(ii) Net Floorspace Capacity (sq m):	2,597	3,882	5,760	7,392	9,109
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	3,710	5,545	8,229	10,560	13,013

NOTES: Assume 'productivity' growth rate for all existing, new and committed convenience goods floorspace as follows:

2011	2012	2013	2014-18	2019-31
0.00%	0.0%	0.2%	0.2%	0.3%

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TABLE 16: BENCHMARK ' & 'POTENTIAL' TURNOVER LEVELS OF EXISTING STORES/ FLOORSPACE

	2011 'Benchmark' Turnover	2011 'Potential' Turnover	Difference
NEWMARKET TOWN CENTRE			
Waitrose (Fred Archer Way)	£21.2	£26.0	£4.8
Iceland (Crown Walk)	£3.1	£2.3	-£0.8
Marks & Spencer (The Guineas)	£1.7	£2.2	£0.5
All Other Local Shops/Market	£3.7	£3.2	-£0.4
SUB-TOTAL	£29.7	£33.8	£4.1
BRANDON TOWN CENTRE			
Aldi (High Street)	£4.9	£10.2	£5.4
All Other Local Shops/Market	£1.3	£1.2	-£0.1
SUB-TOTAL	£6.2	£11.4	£5.3
MILDENHALL TOWN CENTRE			
Sainsbury's (Recreation Way)	£20.3	£22.3	£2.0
Co-Op (Kings Street)	£3.8	£2.7	-£1.1
All Other Local Shops/Market	£1.5	£0.5	-£0.9
SUB-TOTAL	£25.6	£25.6	£0.0
LOCAL CENTRES			
Lakenheath	£0.5	£4.0	£3.5
All Other Local Centres	£0.0		£0.0
SUB-TOTAL	£0.5	£4.0	£3.5
OUT-OF-CENTRE			
Tesco, Fordham Road (Newmarket)	£30.8	£54.4	£23.7
Asda, Studlands Retail Park (Newmarket)	£11.9	£6.0	-£5.9
Tesco, London Road (Brandon)	£12.4	£11.9	-£0.5
All Other Floorspace		£1.6	£1.6
SUB-TOTAL	£55.2	£74.0	£18.8
TOTAL:	£117.1	£148.8	£31.7

Source: Tables 4 and 16.

TABLE 17: BREAKDOWN OF RESIDUAL EXPENDITURE CAPACITY PER CENTRE UP TO 2031

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE	£7.0	£10.6	£15.9	£20.8	£26.0
BRANDON TOWN CENTRE	£2.4	£3.6	£5.4	£7.0	£8.8
MILDENHALL TOWN CENTRE	£5.3	£8.0	£12.1	£15.7	£19.7
LOCAL CENTRES					
Lakenheath Local Centre	£0.8	£1.3	£1.9	£2.5	£3.1
TOTAL:	£15.6	£23.5	£35.3	£46.0	£57.5

Notes: Residual expenditure pure centre based on existing share of potential turnover.

Assume 'productivity' growth rate of 0% per annum between 2011-2012, 0.2% pa in 2013, 0.2% pa between 2014-2018 and 0.3% pa between 2019-31.

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TABLE 18: BREAKDOWN OF FLOORSACE REQUIREMENTS FOR NEWMARKET UP TO 2031

	2011	2016	2021	2026	2031
CAPACITY FOR NEW SUPERSTORE (sq m):					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,096	£12,254	£12,439	£12,627
(ii) Net Floorspace Capacity (sq m):	587	877	1,301	1,670	2,058
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	838	1,253	1,859	2,386	2,940
CAPACITY FOR NEW SUPERMARKET / DEEP DISCOUNTER (sq m):					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,048	£6,127	£6,220	£6,313
(ii) Net Floorspace Capacity (sq m):	1,173	1,754	2,603	3,340	4,115
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	1,676	2,505	3,718	4,771	5,879

TABLE 19: BREAKDOWN OF FLOORSACE REQUIREMENTS FOR BRANDON UP TO 2031

	2011	2016	2021	2026	2031
CAPACITY FOR NEW SUPERSTORE (sq m):					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,096	£12,254	£12,439	£12,627
(ii) Net Floorspace Capacity (sq m):	198	296	440	564	695
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	283	423	628	806	994
CAPACITY FOR NEW SUPERMARKET / DEEP DISCOUNTER (sq m):					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,048	£6,127	£6,220	£6,313
(ii) Net Floorspace Capacity (sq m):	397	593	880	1,129	1,391
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	567	847	1,257	1,612	1,987

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TABLE 20: BREAKDOWN OF FLOORSACE REQUIREMENTS FOR MILDENHALL UP TO 2031

	2011	2016	2021	2026	2031
CAPACITY FOR NEW SUPERSTORE (sq m):					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,096	£12,254	£12,439	£12,627
(ii) Net Floorspace Capacity (sq m):	444	664	985	1,264	1,558
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	635	948	1,407	1,806	2,226
CAPACITY FOR NEW SUPERMARKET / DEEP DISCOUNTER (sq m):					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,048	£6,127	£6,220	£6,313
(ii) Net Floorspace Capacity (sq m):	888	1,328	1,970	2,529	3,116
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	1,269	1,897	2,815	3,612	4,451

TABLE 21: BREAKDOWN OF FLOORSACE REQUIREMENTS FOR LAKENHEATH UP TO 2031

	2011	2016	2021	2026	2031
CAPACITY FOR NEW SUPERSTORE (sq m):					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£12,096	£12,254	£12,439	£12,627
(ii) Net Floorspace Capacity (sq m):	69	104	154	197	243
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	99	148	220	282	348
CAPACITY FOR NEW SUPERMARKET / DEEP DISCOUNTER (sq m):					
(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£6,000	£6,048	£6,127	£6,220	£6,313
(ii) Net Floorspace Capacity (sq m):	139	207	308	395	487
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sq m):	198	296	440	564	695

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Comparison Goods Capacity Assessment

'Baseline' Scenario:

TABLE 1: BASE YEAR POPULATION & PROJECTIONS (2011 - 2031)

						GROWTH (%)
ZONE:	2011	2016	2021	2026	2031	2010 - 31
Zone 1:	26,213	27,624	28,990	30,273	31,610	20.6%
Zone 2:	41,213	43,803	46,234	48,336	50,486	22.5%
Zone 3:	28,963	30,855	32,658	34,365	36,035	24.4%
Zone 4:	28,173	30,462	32,711	34,683	36,457	29.4%
Zone 5:	14,056	15,036	16,079	17,114	18,044	28.4%
Zone 6:	56,338	58,978	61,972	64,850	67,728	20.2%
Zone 7:	13,811	13,909	14,038	14,176	14,262	3.3%
Zone 8:	44,544	46,989	49,409	51,665	53,460	20.0%
Zone 9:	29,871	32,032	34,078	35,924	37,228	24.6%
Zone 10:	10,376	10,980	11,595	12,173	12,606	21.5%
TOTAL:	293,558	310,668	327,765	343,559	357,915	21.9%
Zones 1-3	'CORE' CATCHMENT AREA (CCA):					22.6%
Zones 4&10	'SECONDARY' CATCHMENT AREA (SCA):					27.3%
Zones 5-9	'OUTER CATCHMENT' AREA (OCA):					20.2%

Source: Experian Business Strategies 'Retail Area Planner' Report for each study zone. Communal populations in Zones 1 and 3 have been discounted by 4.05% and 3.15% respectively (in accordance with 2010 Experian Reports for each survey zone) to "ring fence" residents of the District's RAF bases.

Notes: Base year population derived from Experian Revised Population Estimates 2010.

Projections are based on Experian's revised 'demographic component model'. This takes into account 2010 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas and London Boroughs and what would happen if half the Local Housing Plans came to fruition. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.

TABLE 2: BASE YEAR POPULATION & PROJECTIONS FOR RAF RESIDENTS (2011 - 2031)

						GROWTH (%)
ZONE:	2011	2016	2021	2026	2031	2010 - 31
Zone 1:	1,107	1,167	1,225	1,279	1,335	20.6%
Zone 3:	942	1,003	1,062	1,117	1,171	24.4%

Source: Experian Business Strategies 'Retail Area Planner' Report for each study zone. Communal populations in Zones 1 and 3 have been discounted by 4.05% and 3.15% respectively (in accordance with 2010 Experian Reports for each survey zone) to "ring fence" residents of the District's RAF bases.

Notes: Base year population derived from Experian Revised Population Estimates 2010

Projections are based on Experian's revised 'demographic component model'. This takes into account 2010 mid-year age and gender estimates and projects

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2011 Retail and Leisure Study

Comparison Goods Capacity Assessment

'Baseline' Scenario:

TABLE 3: EXPENDITURE PER CAPITA FORECASTS FOR COMPARISON GOODS (2010 prices)

ZONE:	2011	2016	2021	2026	2031
Zone 1:	£2,569	£2,825	£3,286	£3,823	£4,436
Zone 2:	£2,877	£3,163	£3,680	£4,280	£4,968
Zone 3:	£2,383	£2,620	£3,048	£3,546	£4,115
Zone 4:	£2,699	£2,967	£3,452	£4,015	£4,660
Zone 5:	£2,355	£2,589	£3,012	£3,503	£4,066
Zone 6:	£2,705	£2,974	£3,460	£4,024	£4,671
Zone 7:	£3,155	£3,469	£4,036	£4,694	£5,448
Zone 8:	£2,844	£3,127	£3,638	£4,232	£4,911
Zone 9:	£3,073	£3,378	£3,930	£4,571	£5,306
Zone 10:	£2,688	£2,956	£3,438	£3,999	£4,642

Sources & Notes: Average spend per capita estimates for 2011 are derived from Experian 'Retail Area Planner' Reports.

Annual expenditure growth forecasts informed by Experian Business Strategies - Retail Planner Briefing Note 9 (September 2011)

Expenditure on SFT has been deducted at the outset, based on research by Experian Business Strategies (Retail Planning Briefing Notes) and informed by the results of the HTIS.

TABLE 4: EXPENDITURE PER CAPITA FORECASTS FOR RAF RESIDENTS (2010 prices)

ZONE:	2011	2016	2021	2026	2031	GROWTH (%)
Zone 1:	1,002	1,102	1,282	1,491	1,730	72.7%
Zone 3:	929	1,022	1,189	1,383	1,605	72.7%

Sources & Notes: Average spend per capita estimates for 2011 are based on the exchange rate between USD and GBP at the time of writing (circa \$1 to £0.65),

the amount of comparison goods expenditure which could be available for absorption by the local economy (circa 60% of total per capita expenditure) and average per capital expenditure figures for the resident population from Experian 'Retail Area Planner' Reports.

TABLE 5: TOTAL FORECAST GROWTH IN COMPARISON GOODS EXPENDITURE, 2011 - 2031 (£ million)

TABLE 5: TOTAL FORECAST GROWTH IN COMPARISON GOODS EXPENDITURE, 2011 - 2031 (£ million)						GROWTH (%)	
ZONE:	2011	2016	2021	2026	2031	2010 - 31	
Zone 1:	£68.5	£79.3	£96.8	£117.6	£142.5	108.2%	
Zone 2:	£118.6	£138.6	£170.1	£206.9	£250.8	111.5%	
Zone 3:	£69.9	£81.9	£100.8	£123.4	£150.2	114.8%	
Zone 4:	£76.0	£90.4	£112.9	£139.3	£169.9	123.4%	
Zone 5:	£33.1	£38.9	£48.4	£60.0	£73.4	121.7%	
Zone 6:	£152.4	£175.4	£214.4	£261.0	£316.3	107.6%	
Zone 7:	£43.6	£48.3	£56.7	£66.5	£77.7	78.3%	
Zone 8:	£126.7	£147.0	£179.7	£218.6	£262.6	107.2%	
Zone 9:	£91.8	£108.2	£133.9	£164.2	£197.5	115.2%	
Zone 10:	£27.9	£32.5	£39.9	£48.7	£58.5	109.8%	
TOTAL:	£808.4	£940.4	£1,153.7	£1,406.2	£1,699.4	110.2%	
Zones 1 - 3	'CORE' CATCHMENT AREA (CCA):	£256.9	£299.8	£367.8	£447.9	£543.5	111.5%
Zones 4 & 10	'SECONDARY' CATCHMENT AREA (SCA):	£103.9	£122.8	£152.8	£187.9	£228.4	119.8%
Zones 5 - 9	'OUTER CATCHMENT' AREA (OCA):	£447.5	£517.8	£633.1	£770.3	£927.5	107.2%

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Comparison Goods Capacity Assessment

'Baseline' Scenario:

TABLE 6: EXISTING COMPARISON GOODS FLOORSPACE

	Estimated Sales Area (sqm net)
NEWMARKET TOWN CENTRE	18,337
BRANDON TOWN CENTRE	1,383
MILDENHALL TOWN CENTRE	4,837
LOCAL CENTRES:	0
SUB-TOTAL	24,557
NEWMARKET OUT OF CENTRE	
Studlands Retail Park	5,458
Provision in Out of Centre Foodstores	250
SUB-TOTAL	5,707
TOTAL:	30,265

SOURCES: Floorspace estimates have been informed by the 2010 IGD Stores Database; relevant Decision Notices; the Newmarket Experian Goad 'Retail Category Report'; the latest Council audits and floorspace estimates; and our own research.

TABLE 7: NEW RETAIL FLOORSPACE PIPELINE (ie. with planning permission and/or under construction)

	Estimated Sales Area (sqm net)	Average Sales Density (£ per sqm)	2011	2016	2021	2026	2031
Tesco, Lakenheath ⁽¹⁾							
Comparison Goods:	151	£9,500	£1.4	£1.5	£1.6	£1.8	£1.9
The Guineas Extension							
Comparison Goods:	1,661	£5,500	£9.1	£9.6	£10.3	£11.1	£11.9
FOREST HEATH DISTRICT AREA			£10.6	£11.1	£11.9	£12.9	£13.9

SOURCE: Forest Heath District Council

(1) LPA Reference F/2010/0338/FUL

(2) LPA Reference F/2011/0055/EOT. SP estimate that all of this will be for comparison goods.

NOTES: Average sales density grown to each assessment year assuming an annual productivity growth rate of 0.0% per annum in 2011, 0.8% pa in 2012, 1.0% pa in 2013 and 1.5% pa between 2014-31.

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'Baseline' Scenario:

TABLE 8: 'CORE' CATCHMENT AREA (Zones 1 - 3) - MARKET SHARE ANALYSIS (%)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE	23.3%	23.3%	23.3%	23.3%	23.3%
BRANDON TOWN CENTRE	2.9%	2.9%	2.9%	2.9%	2.9%
MILDENHALL TOWN CENTRE	2.9%	2.9%	2.9%	2.9%	2.9%
LAKENHEATH DISTRICT CENTRE	0.1%	0.1%	0.1%	0.1%	0.1%
CENTRE SUBTOTAL:	29.3%	29.3%	29.3%	29.3%	29.3%
NEWMARKET OUT OF CENTRE	5.3%	5.3%	5.3%	5.3%	5.3%
RAF BASES	0.3%	0.3%	0.3%	0.3%	0.3%
OUT OF CENTRE SUBTOTAL:	5.7%	5.7%	5.7%	5.7%	5.7%
DISTRICT AREA SUBTOTAL:	34.9%	34.9%	34.9%	34.9%	34.9%
OUTSIDE DISTRICT					
Bury St. Edmunds	33.1%	33.1%	33.1%	33.1%	33.1%
Cambridge	17.1%	17.1%	17.1%	17.1%	17.1%
Ely	0.7%	0.7%	0.7%	0.7%	0.7%
King's Lynn	0.4%	0.4%	0.4%	0.4%	0.4%
Downham Market	0.0%	0.0%	0.0%	0.0%	0.0%
Thetford	10.1%	10.1%	10.1%	10.1%	10.1%
Haverhill	0.1%	0.1%	0.1%	0.1%	0.1%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%
Norwich	1.1%	1.1%	1.1%	1.1%	1.1%
Other Shopping Facilities Outside District	2.5%	2.5%	2.5%	2.5%	2.5%
OUTSIDE DISTRICT SUBTOTAL:	65.1%	65.1%	65.1%	65.1%	65.1%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%

SOURCE: Combined comparison goods market shares based on results of HTIS.

NOTE: Please note figures may not add up due to rounding.

TABLE 9: 'SECONDARY' CATCHMENT AREA (NOCA) (Zones 4 & 10) - MARKET SHARE ANALYSIS (%)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE	10.7%	10.7%	10.7%	10.7%	10.7%
BRANDON TOWN CENTRE	0.4%	0.4%	0.4%	0.4%	0.4%
MILDENHALL TOWN CENTRE	0.9%	0.9%	0.9%	0.9%	0.9%
LAKENHEATH DISTRICT CENTRE	0.4%	0.4%	0.4%	0.4%	0.4%
CENTRE SUBTOTAL:	12.4%	12.4%	12.4%	12.4%	12.4%
NEWMARKET OUT OF CENTRE	4.3%	4.3%	4.3%	4.3%	4.3%
RAF BASES	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE SUBTOTAL:	4.3%	4.3%	4.3%	4.3%	4.3%
DISTRICT AREA SUBTOTAL:	16.7%	16.7%	16.7%	16.7%	16.7%
OUTSIDE DISTRICT					
Bury St. Edmunds	11.7%	11.7%	11.7%	11.7%	11.7%
Cambridge	19.8%	19.8%	19.8%	19.8%	19.8%
Ely	23.5%	23.5%	23.5%	23.5%	23.5%
King's Lynn	9.6%	9.6%	9.6%	9.6%	9.6%
Downham Market	4.2%	4.2%	4.2%	4.2%	4.2%
Thetford	3.6%	3.6%	3.6%	3.6%	3.6%
Haverhill	0.0%	0.0%	0.0%	0.0%	0.0%
Sudbury	0.0%	0.0%	0.0%	0.0%	0.0%
Norwich	1.8%	1.8%	1.8%	1.8%	1.8%
Other Shopping Facilities Outside District	9.1%	9.1%	9.1%	9.1%	9.1%
OUTSIDE DISTRICT SUBTOTAL:	83.3%	83.3%	83.3%	83.3%	83.3%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%

SOURCE: Combined comparison goods market shares based on results of HTIS.

NOTE: Please note figures may not add up due to rounding.

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'Baseline' Scenario:

TABLE 10: 'OUTER' CATCHMENT AREA (Zones 5, 6, 7, 8 & 9) - MARKET SHARE ANALYSIS (%)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE	0.9%	0.9%	0.9%	0.9%	0.9%
BRANDON TOWN CENTRE	0.1%	0.1%	0.1%	0.1%	0.1%
MILDENHALL TOWN CENTRE	0.1%	0.1%	0.1%	0.1%	0.1%
LAKENHEATH DISTRICT CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%
CENTRE SUBTOTAL:	1.1%	1.1%	1.1%	1.1%	1.1%
NEWMARKET OUT OF CENTRE	0.2%	0.2%	0.2%	0.2%	0.2%
RAF BASES	0.0%	0.0%	0.0%	0.0%	0.0%
OUT OF CENTRE SUBTOTAL:	0.2%	0.2%	0.2%	0.2%	0.2%
DISTRICT AREA SUBTOTAL:	1.2%	1.2%	1.2%	1.2%	1.2%
OUTSIDE DISTRICT					
Bury St. Edmunds	51.6%	51.6%	51.6%	51.6%	51.6%
Cambridge	16.0%	16.0%	16.0%	16.0%	16.0%
Ely	2.3%	2.3%	2.3%	2.3%	2.3%
King's Lynn	0.5%	0.5%	0.5%	0.5%	0.5%
Downham Market	0.1%	0.1%	0.1%	0.1%	0.1%
Thetford	8.9%	8.9%	8.9%	8.9%	8.9%
Haverhill	10.2%	10.2%	10.2%	10.2%	10.2%
Sudbury	0.6%	0.6%	0.6%	0.6%	0.6%
Norwich	4.6%	4.6%	4.6%	4.6%	4.6%
Other Shopping Facilities Outside District	4.1%	4.1%	4.1%	4.1%	4.1%
OUTSIDE DISTRICT SUBTOTAL:	98.8%	98.8%	98.8%	98.8%	98.8%
TOTAL MARKET SHARE:	100.0%	100.0%	100.0%	100.0%	100.0%

SOURCE: Combined comparison goods market shares based on results of HTIS.

NOTE: Please note figures may not add up due to rounding.

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'Baseline' Scenario:

TABLE 11: 'CORE' CATCHMENT AREA (Zones 1 - 3) - COMPARISON GOODS TURNOVER (£m)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE	£60.0	£70.0	£85.9	£104.6	£126.9
BRANDON TOWN CENTRE	£7.4	£8.6	£10.6	£12.9	£15.6
MILDENHALL TOWN CENTRE	£7.5	£8.7	£10.7	£13.0	£15.8
LAKENHEATH DISTRICT CENTRE	£0.4	£0.4	£0.5	£0.7	£0.8
CENTRE SUBTOTAL:	£75.2	£87.8	£107.7	£131.1	£159.1
NEWMARKET OUT OF CENTRE	£13.7	£16.0	£19.6	£23.9	£29.0
RAF BASES	£0.8	£0.9	£1.2	£1.4	£1.7
OUT OF CENTRE SUBTOTAL:	£14.5	£17.0	£20.8	£25.3	£30.8
DISTRICT AREA SUBTOTAL:	£89.8	£104.7	£128.5	£156.5	£189.9
OUTSIDE STUDY AREA					
Bury St. Edmunds	£84.9	£99.1	£121.6	£148.0	£179.6
Cambridge	£43.9	£51.2	£62.8	£76.5	£92.9
Ely	£1.8	£2.1	£2.6	£3.1	£3.8
King's Lynn	£1.0	£1.2	£1.5	£1.8	£2.2
Downham Market	£0.1	£0.1	£0.1	£0.1	£0.2
Thetford	£25.9	£30.2	£37.1	£45.2	£54.8
Haverhill	£0.3	£0.4	£0.5	£0.6	£0.7
Sudbury	£0.0	£0.0	£0.0	£0.0	£0.0
Norwich	£2.7	£3.2	£3.9	£4.7	£5.7
Other Shopping Facilities Outside District	£6.5	£7.6	£9.3	£11.3	£13.8
OUTSIDE DISTRICT SUBTOTAL:	£167.2	£195.0	£239.3	£291.4	£353.6
TOTAL:	£256.9	£299.8	£367.8	£447.9	£543.5

SOURCE: Tables 3 & 6.

NOTE: Please note figures may not add up due to rounding.

TABLE 12: 'SECONDARY' CATCHMENT AREA (Zones 4 & 10) - COMPARISON GOODS TURNOVER (£m)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE	£11.2	£13.2	£16.4	£20.2	£24.5
BRANDON TOWN CENTRE	£0.4	£0.5	£0.6	£0.7	£0.9
MILDENHALL TOWN CENTRE	£0.9	£1.1	£1.3	£1.6	£2.0
LAKENHEATH DISTRICT CENTRE	£0.4	£0.5	£0.6	£0.8	£0.9
CENTRE SUBTOTAL:	£12.9	£15.2	£19.0	£23.3	£28.3
NEWMARKET OUT OF CENTRE	£4.5	£5.3	£6.6	£8.1	£9.8
RAF BASES	£0.0	£0.0	£0.0	£0.0	£0.0
OUT OF CENTRE SUBTOTAL:	£4.5	£5.3	£6.6	£8.1	£9.8
DISTRICT AREA SUBTOTAL:	£17.4	£20.5	£25.5	£31.4	£38.2
OUTSIDE DISTRICT					
Bury St. Edmunds	£12.1	£14.4	£17.9	£22.0	£26.7
Cambridge	£20.6	£24.3	£30.2	£37.2	£45.2
Ely	£24.4	£28.9	£35.9	£44.2	£53.7
King's Lynn	£10.0	£11.8	£14.7	£18.0	£21.9
Downham Market	£4.3	£5.1	£6.4	£7.8	£9.5
Thetford	£3.8	£4.4	£5.5	£6.8	£8.3
Haverhill	£0.0	£0.0	£0.0	£0.0	£0.0
Sudbury	£0.0	£0.0	£0.0	£0.0	£0.0
Norwich	£1.9	£2.2	£2.8	£3.4	£4.2
Other Shopping Facilities Outside District	£9.5	£11.2	£13.9	£17.1	£20.8
OUTSIDE DISTRICT SUBTOTAL:	£86.6	£102.3	£127.2	£156.5	£190.2
TOTAL:	£103.9	£122.8	£152.8	£188.0	£228.4

SOURCE: Tables 3 & 7.

NOTE: Please note figures may not add up due to rounding.

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'Baseline' Scenario:

TABLE 13: 'OUTER' CATCHMENT AREA (Zones 5 - 9) - COMPARISON GOODS TURNOVER (£m)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE	£4.1	£4.8	£5.8	£7.1	£8.5
BRANDON TOWN CENTRE	£0.4	£0.4	£0.5	£0.6	£0.8
MILDENHALL TOWN CENTRE	£0.3	£0.4	£0.4	£0.5	£0.6
LAKENHEATH DISTRICT CENTRE	£0.0	£0.0	£0.0	£0.0	£0.0
CENTRE SUBTOTAL:	£4.8	£5.5	£6.8	£8.3	£9.9
NEWMARKET OUT OF CENTRE	£0.7	£0.8	£1.0	£1.2	£1.4
RAF BASES	£0.0	£0.0	£0.0	£0.0	£0.0
OUT OF CENTRE SUBTOTAL:	£0.7	£0.8	£1.0	£1.2	£1.4
DISTRICT AREA SUBTOTAL:	£5.5	£6.3	£7.8	£9.4	£11.4
OUTSIDE DISTRICT					
Bury St. Edmunds	£230.8	£267.0	£326.6	£397.3	£478.4
Cambridge	£71.4	£82.6	£101.1	£122.9	£148.0
Ely	£10.3	£11.9	£14.6	£17.8	£21.4
King's Lynn	£2.2	£2.6	£3.1	£3.8	£4.6
Downham Market	£0.3	£0.4	£0.5	£0.6	£0.7
Thetford	£39.9	£46.1	£56.4	£68.6	£82.6
Haverhill	£45.7	£52.9	£64.6	£78.6	£94.7
Sudbury	£2.5	£2.9	£3.5	£4.3	£5.2
Norwich	£20.6	£23.8	£29.1	£35.4	£42.6
Other Shopping Facilities Outside District	£18.3	£21.2	£25.9	£31.6	£38.0
OUTSIDE DISTRICT SUBTOTAL:	£442.1	£511.4	£625.4	£760.9	£916.1
TOTAL:	£447.5	£517.8	£633.2	£770.4	£927.5

SOURCE: Tables 3 & 8.

NOTE: Please note figures may not add up due to rounding.

TABLE 14: TOTAL TURNOVER DERIVED FROM STUDY AREA (Zones 1 - 10) (£m)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE	£75.3	£88.0	£108.1	£131.9	£160.0
BRANDON TOWN CENTRE	£8.2	£9.5	£11.7	£14.3	£17.3
MILDENHALL TOWN CENTRE	£8.7	£10.1	£12.4	£15.2	£18.4
LAKENHEATH DISTRICT CENTRE	£0.8	£0.9	£1.2	£1.4	£1.7
CENTRE SUBTOTAL:	£92.9	£108.6	£133.4	£162.7	£197.4
NEWMARKET OUT OF CENTRE	£18.9	£22.1	£27.2	£33.2	£40.3
RAF BASES	£0.8	£0.9	£1.2	£1.4	£1.7
OUT OF CENTRE SUBTOTAL:	£19.7	£23.0	£28.4	£34.6	£42.0
DISTRICT AREA TOTAL:	£112.6	£131.6	£161.8	£197.3	£239.4

SOURCE: Tables 9, 10 & 11.

NOTE: Please note figures may not add up due to rounding.

TABLE 15: ESTIMATED TRADE DRAW FROM OUTSIDE STUDY AREA (i.e. beyond Zones 1-10) (%)

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE	5.0%	5.0%	5.0%	5.0%	5.0%
BRANDON TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%
MILDENHALL TOWN CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%
LAKENHEATH DISTRICT CENTRE	0.0%	0.0%	0.0%	0.0%	0.0%
NEWMARKET OUT OF CENTRE	4.0%	4.0%	4.0%	4.0%	4.0%

TABLE 16: TOTAL 'POTENTIAL' TURNOVER OF ALL CENTRES & SHOPPING LOCATIONS WITHIN STUDY AREA

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE	£79.0	£92.3	£113.5	£138.5	£168.0
BRANDON TOWN CENTRE	£8.2	£9.5	£11.7	£14.3	£17.3
MILDENHALL TOWN CENTRE	£8.7	£10.1	£12.4	£15.2	£18.4
LAKENHEATH DISTRICT CENTRE	£0.8	£0.9	£1.2	£1.4	£1.7
CENTRE SUBTOTAL:	£96.7	£112.9	£138.8	£169.3	£205.4
NEWMARKET OUT OF CENTRE	£19.6	£23.0	£28.3	£34.5	£41.9
RAF BASES	£0.8	£0.9	£1.2	£1.4	£1.7
OUT OF CENTRE SUBTOTAL:	£20.5	£23.9	£29.5	£36.0	£43.6
DISTRICT AREA TOTAL:	£117.1	£136.9	£168.3	£205.3	£249.0

SOURCE: Tables 12 & 13.

NOTE: Please note figures may not add up due to rounding.

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TABLE 17: FOREST HEATH DISTRICT - COMPARISON GOODS CAPACITY ASSESSMENT

	2011	2016	2021	2026	2031
STEP 1: TOTAL EXISTING FLOORSPACE IN DISTRICT (sqm net):	30,265	30,265	30,265	30,265	30,265
STEP 2: TOTAL FORECAST 'POTENTIAL' TURNOVER IN DISTRICT (£ m):					
(i) Total 'Potential' Turnover (£ million):	£117.1	£136.9	£168.3	£205.3	£249.0
(ii) Average Sales Density (£ per sqm):	£3,870	£4,523	£5,560	£6,782	£8,229
STEP 3: TOTAL FORECAST 'BENCHMARK' TURNOVER (£ m):					
(i) Total 'Benchmark' Turnover (£ million):	£117.1	£124.7	£134.3	£144.7	£155.9
(ii) Average Sales Density (£ per sqm):	£3,870	£4,120	£4,439	£4,782	£5,151
STEP 4: FORECAST TURNOVER OF COMMITTED/PROPOSED FLOORSPACE (£ m):	£10.6	£11.1	£11.9	£12.9	£13.9
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	£0.0	£1.1	£22.0	£47.7	£79.3
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:					
(i) Estimated Average Sales Density of New Floorspace (£ per sqm):	£5,500	£5,855	£6,308	£6,795	£7,320
(ii) Net Floorspace Capacity (sqm):	0	188	3,487	7,017	10,830
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sqm):	0	269	4,982	10,024	15,471
NOTES:	Assume 'productivity' growth rate for all existing, new and committed comparison goods floorspace as follows:				
	2011 0.25%	2012 0.8%	2013 1.0%	2014-18 1.5%	2019-31 1.5%

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TABLE 18: BREAKDOWN OF FORECAST EXPENDITURE PER CENTRE UP TO 2031

	2011	2016	2021	2026	2031
NEWMARKET TOWN CENTRE	£0.0	£0.9	£18.0	£39.0	£64.8
BRANDON TOWN CENTRE	£0.0	£0.1	£1.9	£4.0	£6.7
MILDENHALL TOWN CENTRE	£0.0	£0.1	£2.0	£4.3	£7.1
LOCAL CENTRES					
Lakenheath Local Centre	£0.0	£0.0	£0.2	£0.4	£0.7
TOTAL:	£0.0	£1.1	£22.0	£47.7	£79.3

TABLE 19: BREAKDOWN OF FLOORSPACE REQUIREMENTS FOR NEWMARKET UP TO 2031

	2011	2016	2021	2026	2031
CAPACITY FOR NEW HIGH DENSITY COMPARISON GOODS FLOORSPACE (sqm):					
(i) Estimated Average Sales Density of New Floorspace (£ per sqm):	£5,500	£5,855	£6,308	£6,795	£7,320
(ii) Net Floorspace Capacity (sqm):	0	154	2,851	5,736	8,854
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sqm):	0	220	4,073	8,195	12,648

TABLE 20: BREAKDOWN OF FLOORSPACE REQUIREMENTS FOR BRANDON UP TO 2031

	2011	2016	2021	2026	2031
CAPACITY FOR NEW HIGH DENSITY COMPARISON GOODS FLOORSPACE (sqm):					
(i) Estimated Average Sales Density of New Floorspace (£ per sqm):	£5,500	£5,855	£6,308	£6,795	£7,320
(ii) Net Floorspace Capacity (sqm):	0	16	295	593	915
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sqm):	0	23	421	847	1,307

TABLE 21: BREAKDOWN OF FLOORSPACE REQUIREMENTS FOR MILDENHALL UP TO 2031

	2011	2016	2021	2026	2031
CAPACITY FOR NEW HIGH DENSITY COMPARISON GOODS FLOORSPACE (sqm):					
(i) Estimated Average Sales Density of New Floorspace (£ per sqm):	£5,500	£5,855	£6,308	£6,795	£7,320
(ii) Net Floorspace Capacity (sqm):	0	17	313	629	971
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sqm):	0	24	447	899	1,388

TABLE 22: BREAKDOWN OF FLOORSPACE REQUIREMENTS FOR LAKENHEATH UP TO 2031

	2011	2016	2021	2026	2031
CAPACITY FOR NEW HIGH DENSITY COMPARISON GOODS FLOORSPACE (sqm):					
(i) Estimated Average Sales Density of New Floorspace (£ per sqm):	£5,500	£5,855	£6,308	£6,795	£7,320
(ii) Net Floorspace Capacity (sqm):	0	2	29	58	90
(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) Gross Floorspace Capacity (sqm):	0	2	41	83	128

APPENDIX 9: THE RETAIL SECTOR – KEY TRENDS

Britain's urban, retail and leisure landscape has changed dramatically since the 1980s. It has been characterised by significant changes in the scale and location of new retail and leisure development. This has fuelled and been driven by the dynamic shifts in the nation's shopping and leisure habits. It has also been shaped by the complex interaction of political, economic, social, consumer lifestyle, market demand and investment trends. Based on a review of current research and thinking, the following commentary describes some of the key drivers of change in the retail and leisure sectors over the last three decades.

THE ECONOMIC CONTEXT

The UK Economy

The retail sector makes a significant contribution to the UK economy; accounting for approximately 8% of Gross Domestic Product (GDP) and over 4.5 million full-time and part-time equivalent jobs.

From the mid-1990s until 2007 the UK benefitted from an unprecedented period of strong and sustained economic growth. This growth was underpinned by a range of inter-related political and economic factors, including easy access to credit, the housing "boom" and low interest rates. This, in turn, fuelled significant growth in the retail sector and property market, generally resulting in what can now be viewed as a "golden age" for major new retail-led development.

However, since 2008 the UK and global markets have experienced an equally dramatic recessionary period. Domestic demand has been constrained by a range of factors including, *inter alia*, high and rising unemployment; pressure on public finances; rising inflation; a continued reluctance by banks to lend to businesses and investors; and increase in the weight of household debt; and the reduction of disposable income. This has resulted in one of the most testing economic and trading environments in living memory, culminating in the Government having to "bail out" the banking system (through "quantitative easing"). The depth and length of the recession has had (and will continue to have) a significant impact on consumer, business, investor and developer confidence over the short to medium term at least.

Although revised official estimates of the economy's performance for the first two quarters of 2010 showed a "return to growth", Experian in the latest Retail Planner Briefing Note 8.1 (August 2010) identified that growth is "patchy" and the risks of a relapse (or "double-dip") persist, a particularly salient point in the wake of the latest news on the American debt crisis. Forecasters are also particularly concerned that economic growth could be destabilised by the Coalition Government's October 2010 spending cuts and rising VAT and inflation, and resultant strain in consumers' disposable incomes. Investor confidence will probably remain "fragile"

over the next 12 months, at least until the impact of tax rises (including the increase in VAT to 20% as of January 2011) and the spending cuts have been better understood.

Notwithstanding this more “gloomy” outlook, low interest rates, the revival in fixed investment and the Government’s stated intention to ease the planning process for development in the NPPF should provide some support to growth over the short term.

Experian forecast year-on-year growth in GDP of +1.5% for 2010, largely due to the growth in construction and healthier global growth. Over the short term, GDP is forecast to increase steadily to +1.6% in 2011 and +1.8% in 2012.

Over the medium term (i.e. 2013 to 2017), Experian (August 2010) forecast GDP growth will average circa +2.2% per annum, although this will be lower than the annual average of circa +3.0% experienced during the “boom” period from 1995 to 2007. The more pessimistic growth forecasts have been informed and influenced by a range of inter-related factors including:

- The likely impact of the public sector spending cuts;
- A reduction in investment and the further cancellation/ postponement of major infrastructure and development projects;
- Increasing household debt and the move away from the “credit-fuelled” growth of the pre-recessionary period;
- The tighter regulation of London’s financial services sector; and
- A more subdued housing market than in the 12 years to 2007 when house price rises averaged circa 10% per annum.

Over the long term, forecasters appear to be in agreement that growth will not achieve the levels experienced between 1995 and 2007. Instead, Experian forecasts GDP growth ranging from 1.7% to 2.4% between 2017 and 2027. These more pessimistic forecasts will have significant implications for consumer and retail spending growth over the short, medium and longer term than previously assumed by retail planning assessments carried out pre-2009/10, including Forest Heath’s 2006 *Retail and Town Centre Study*. The unprecedented growth in consumer and retail spending in the “boom” period helped to “fuel” the growth in new retail development over the last 10-15 years, but as we describe below the country is now entering a much more “austere” period. This has implications for new town centre investment and development projects that were planned before the onset of the economic recession, and those which will be coming forward in the future.

Household Spending

Britain’s household and consumer confidence has been significantly eroded by the recession. Over recent years the rise in energy (petrol) costs, increasing debt, rising unemployment and the weakening value of the pound have impacted on consumer spending. At the same time

the housing market downturn has also deterred mortgage equity withdrawal, which had previously helped to fuel the growth of consumer spending.

Notwithstanding this, research by Experian (August 2010) shows that consumer spending on retail goods has generally been more resilient than total consumer spending over the last 12 months. For example, official retail sales data indicates that spending volumes (excluding fuel) increased by 2.3% for the year to March 2010. This divergence between total consumer spending and retail expenditure is explained by three major factors:

- consumers have cut back on “big ticket” items, such as expensive holidays abroad, but continue to spend on other items;
- heavy discounting by retailers has helped to maintain and increase retail spending volumes; and
- a transfer of spending from services (such as, for example, entertainment and personal care) to spending on similar items for use in the home (e.g. flat-screen TVs, home entertainment systems, etc.).

Experian forecast that consumer retail spending will be constrained over the short-term due to the weak labour market and the likely downward pressure on incomes. The table below summarises Experian’s latest recorded and forecasted expenditure per capita growth rates for the main categories of retail spending up between 2007 and 2027. These are compared with the historical (‘ultra’, ‘long’ and ‘medium’ term) growth rates previously used in retail planning studies.

Table 1.1 Growth in Retail Spend per Head (% change), 2007 - 2027

	Recorded Growth			Forecast Growth						Historic Growth		
	'07	'08	'09	'10	'11	'12	2013-17	2018-27	2012-2027	Ultra long	Long term	Med term
Retail Spend	1.9	1.9	-1.4	0.3	0.8	1.8	2.1	2.3	2.2	2.8	3.3	3.5
Convenience Goods:	0.4	-1.6	-2.9	0.3	0.0	0.4	0.8	0.9	0.9	0.5	0.7	0.7
Comparison Goods	2.7	3.7	-0.6	0.4	1.2	2.4	2.7	2.9	2.8	4.7	5.3	5.5

Source: Experian *Retail Planner Briefing Note 8.1* (August 2010) Figure 1.

Note: Ultra-long growth rate trend covers the period between 1969 – 2009; long-term between 1979-2009; and medium-term between 1989-2009.

In future, Experian estimate that forecasted per capita growth rates will be lower than historic trends for a number of inter-related factors, including the increasing maturity of the UK economy; less expansionary consumer credit; greater emphasis on green issues (including higher energy costs); and an ageing population. As a result, average comparison goods retail spending growth of +2.8% per annum for the period 2012-2027 is significantly lower than historic growth trends and indeed, the growth rate of 4.3% used in the Council’s 2006 *Retail Study*. For convenience goods the difference between the forecasts and historic trends is not as marked.

These growth forecasts are an important “input” when assessing the need for new retail floorspace in the District as part of retail studies, as well as testing the potential impact of new development in accordance with the NPPF when determining applications for new retail floorspace. Experian has recommended that it is appropriate to use more cautious long-term forecasts (2012-2027) rather than forecasts based on past growth trends for the reasons set out above.

Retail Sales Densities

Since the end of the early 1990s economic recession up until the beginning of the latest recession in mid-2008, a substantial amount of new retail floorspace has been developed. Much of it has been in the form of food superstores and retail warehouses, located on out-of-centre sites. Town centre development has been mainly in large and medium sized towns, generally the top 100 or so retail centres in the country by size.

However, provision of new floorspace has not matched growth in expenditure, partially explaining why sales densities have been rising across the board. Sunday trading and extended weekday opening hours have enabled existing floorspace to absorb substantial growth. Sales of higher value goods which do not necessarily need more space for storage, display and sale has also helped contribute to higher sales densities. In practice, town centre sales densities have proved to be highly elastic, and the concept of ‘overtrading’ therefore needs to be applied with some caution.

In contrast, convenience goods sales densities have exhibited varying growth trends over recent years. For example, between 2000/01 and 2006/07 Asda experienced a rise in convenience goods sales density of 14.6%. However, over the same period, Sainsbury’s sales densities fell by a similar rate and Lidl experienced a 20.8% fall. The differences in these growth rates partly reflect the increasing battle for market share amongst the leading multiple grocery retailers. However, it is also partly a result of the rapid increase in floorspace over this period, coupled with disproportionately low growth in convenience goods expenditure. As a result convenience goods sales densities have dipped slightly downwards. The higher growth rate of comparison compared to convenience goods partially explains why a number of leading foodstore operators are seeking to increase their non-food sales areas through extensions and larger store formats.

RETAIL DEVELOPMENT TRENDS

The scale, nature and location of new retail investment and development since the 1960s has been shaped by the UK’s economic cycles, along with political and planning policy changes. By the beginning of the 1980s town centres were the primary focus for most retail and leisure activity. The out-of-centre retail sector phenomenon began during the 1970s when some supermarket operators started opening in out-of-centre locations and ‘first generation’ free-standing retail warehouse units on industrial estates. Brent Cross opened in 1976 and was the only free-standing regional shopping centre at that time. Previously, the ‘monopoly’ of the

high street had largely gone unchallenged. However, since the 1980s there has been a profound shift in the geography of new retail and leisure development. Town centres are no longer necessarily operators' (or, as a result, consumers') first choice for a range of shopping, leisure, entertainment and employment uses and activities.

This shift in investment and spend away from town centres was driven by a combination of policy, economic, social, demographic and property market trends. During the early 1980s, for example, the Government promoted a 'laissez-faire' approach to planning and development in order to encourage much needed economic and employment growth following the recession of the late 1970s. At the same time there was an exodus of people and jobs from Britain's cities and towns to the suburbs. This effectively created a large new "pool" of household expenditure outside of Britain's town centres. Concurrently, high streets were suffering from a lack of investment and management during the 1970s and 1980s. As a result, they were not attractive or easily accessible shopping locations for the increasingly mobile and discerning consumer and few people were choosing to living in or close to centres.

Investors, developers and operators responded to (and fuelled) these changes through increased applications and permissions for new retail development in out-of-centre locations. The so-called 'waves' of out-of-centre development are summarised below.

Table 1.2 The "Waves" of Out-of-Centre Retail Development

"Wave"	Description
First Wave	The decentralisation of free standing superstores and hypermarkets first began during the late 1960s and gathered pace during the 1970s.
Second Wave	Development of free standing retail warehouses began in the late 1970s and was followed by retail parks during the 1980s. This "wave" was initially characterised by "bulky goods" operators (defined as DIY, furniture, carpets, electrical goods and motor accessories) trading from "large format" stores. This then evolved into clusters of retail warehouses in retail parks and finally into a number of Open A1 retail parks which attracted more traditional 'high street' retailers (such as, for example, The Fort Shopping Park in Birmingham).
Third Wave	The more relaxed planning policy approach to new retail development during the 1980s resulted in a significant surge in applications for free standing out-of-centre regional shopping centres (RSCs). The Metro Centre in Newcastle represented a new generation of shopping centres after Brent Cross (which opened 1976) and was followed by Merry Hill, Lakeside, Meadowhall and Blue Water. These shopping centres are anchored by major department store operators and supported by a wide range of national multiples trading from larger format modern stores and served by extensive car parking, generally located next to major motorway junctions. Westfield in West London is the last of the major RSCs to be developed in the UK.
Fourth Wave	During the recession of the early 1990s there was a rise of factory outlet centres (FOCs) offering quality end-of-line / out-of-season goods at discounted prices in attractive shopping environments.

Note: Also see Glossary of Terms.

This rapid decentralisation of retail floorspace and other town centre uses (such as offices, cinemas, restaurants and other commercial leisure activities) precipitated the "tightening" of Government policy from the mid-1990s onwards; beginning with revised Planning Policy

Guidance Note 6 (PPG6) *Town Centres and Retail Development* (1996), then PPS6 *Planning for Town Centres* (March 2005) and most recently by PPS4 *Planning for Sustainable Economic Growth*. Through the sequential and impact tests contained in these statements, the Government has strengthened the role of the planning system and placed increased emphasis on sustainable mixed-use development in town centres “first”, underpinned by high quality urban design.

This has, in turn, resulted in a slowdown in permissions for new out-of-centre development over the last decade. For example, the proportion of new retail floorspace being developed within (or on the edge of) town centres has increased from a low of circa 25% in 1994 to approximately 50% by 2007/08. Notwithstanding this, there has still been a significant quantum of out-of-centre retail development. This may be further fuelled by the recently published NPPF and its “*presumption in favour sustainable development*”. As a material consideration to plan- and decision-making this policy document will likely result in an increase in applications for out-of-centre retail floorspace, albeit the NPPF retains the strong town centre first approach towards new retail development.

During the last decade, many of Britain’s major centres have benefited from significant new town centre retail-led investment and development, such as in Exeter, Liverpool, Belfast, High Wycombe, Birmingham and Norwich. These schemes have been at the heart of urban regeneration and investment programmes and, in some cases, have helped to revitalise “tired” and “failing” town centres and high streets.

However, over the last 2 years the impact of the economic recession on developer and investor confidence, combined with the withdrawal of lending by the banks, has resulted in a number of high profile schemes either being shelved, frozen or delayed. The table below shows 11 major schemes that have been ‘frozen’ or ‘shelved’ during the recession; equivalent to some 545,900m² of retail floorspace and circa £3.6 billion of new investment that has effectively been “lost” from these towns. One of the more high profile “casualties” is the Northern Quarter in Portsmouth, which has reportedly been shelved until 2015, despite the fact that it had planning permission and had been through a lengthy and costly land assembly process and CPO Inquiry, as well as having retailers already signed up. We estimate that these 11 schemes alone represent just a fraction of the total estimated retail floorspace that has been shelved over the last 3 years.

Table 1.3 Retail Schemes Shelved, Frozen or Delayed in 2008- 2010

Location	Scheme	Developer	Retail Space (m ²)	Estimated Value (£m)
Leeds	Eastgate Quarter	Hammerson	110,000	800
Portsmouth	Northern Quarter	Centros	96,500	500
Sheffield	Seven Stone	Hammerson	80,000	600
Oxford	Westgate	Crown Estate and Land Securities	69,000	330
Stockport	Bridgefield	Lend Lease	60,400	500
Poole	Dolphin Shopping Centre	Grovesnor	35,000	Unknown
Lancaster	Canal Corridor	Centros	30,000	140
Liverpool	Hope Street	Maghull Developments	20,000	100
Bristol	Temple Quay	Castlemore Securities	20,000	200
Hemel Hempsted	Waterhouse Square	Thornfield Ventures	18,500	365
Hull	Fruit Market	Igloo	6,500	100
TOTAL:			545,900	3,635

Source: Strategic Perspectives LLP (July 2011).

The economic recession has effectively “flushed out” some of the more “marginal”, “expensive” and “risky” development schemes. As a result many of Britain’s cities and towns that were set to benefit from much needed new investment and regeneration over the next 5 years may now have to wait several years before confidence and investors return. Even then, the scale and type of new investment that will emerge in the post-recessionary period could be very different to the last decade of development.

Nevertheless, despite the downturn in development and investment activity, there have been a few “success stories” over the last 2 years. For example Bristol’s Cabot Circus secured a number of high quality tenants before and after its opening, including Apple, The White Company, Fred Perry, Harvey Nichols, and Bench. Similarly, Westfield London has benefitted from strong trading and footfall figures since it opened in West London in October 2008. Its shopping offer comprises mainstream brands alongside niche boutique retailers, some with their first UK stores. Other examples of recent new shopping centre openings in recent years include The Arc in Bury St. Edmunds (60,400m²); St David’s 2 in Cardiff (88,260m²); and Union Square in Aberdeen (65,030m²).

In general terms new shopping centre development schemes with high quality well-designed shopper friendly environments, with a good mix of different shops, attractions and facilities, that serve a wide range of consumers and a strong catchment population have been cushioned from the worse effects of the recession.

Nevertheless, the pipeline of new shopping centre developments has fallen dramatically over recent years. For example, the total amount of shopping centre floorspace in the pipeline as of Autumn 2010 is 3.2 million m², 21.25% less than in the same time the previous year (Colliers *UK Shopping Centre Development Pipeline*). Of this, almost half is only at pre-planning or application stage and will therefore not necessarily come forward at estimated levels or in the near future. Looking forward, the retail development pipeline has “slowed to a trickle” compared with the shopping centre “boom” over the last 5-10 years. Of the handful of shopping centre developments scheduled to open in 2011/12, these are limited to only three schemes: the Westfield Development in Stratford City (which accounts for over half of all planned floorspace), Parkway in Newbury Town, and Trinity Walk in Wakefield. The only opening planned in 2012/ 2013 is the redevelopment of the ‘Trinity Leeds’ Shopping Centre which will increase the retail offer by approximately 43,000m² and is scheduled for completion in Spring 2013. Current predictions by Colliers International reveal an influx of around 830,000m² of new floorspace in 2014/2015, however *“in reality it is likely that this will even out in the coming years as projects continue to be put back or are significantly scaled down.”*

Research undertaken by the British Council of Shopping Centres (BCSC) indicates that as the UK retail sector emerges from the recession and confidence returns to the marketplace, retailers will respond to rising sales by increasing their demand for space. The ‘demand for space’ will remain one of the primary methods by which retailers will grow their business and profit, and is therefore a vital ingredient in the future prosperity of the retail sector as a whole. However, the major difficulty for retailers over the medium term will be the ‘lag’ between their ‘demand for space’ and the time it will take for stalled developments to be ‘revived and delivered’. We consider this issue in more detail below.

THE RETAIL OCCUPATIONAL MARKET

The tougher trading conditions and fall in consumer spending has impacted heavily on retailers’ sales and profit margins. There has been a significant restructuring and consolidation in the retail occupational market since 2008, with various “winners” and “losers” emerging within the food and non-food sectors.

Business Failures & Vacancies

There were a number of early casualties as the economic recession deepened during late 2008 and early 2009. The highest profile of these was Woolworths, which went into administration in late 2008 after almost 100 years of trading. By the end of January 2009 all of its stores (of which there were circa 830) had closed, the majority of which were in prime shopping streets across the UK and served as the main “anchor” stores in certain smaller centres. Other retailers and operators that disappeared and/or were forced into administration during 2008/09 include the following:



A new wave of closures and operators going into administration was announced earlier this year and includes: Habitat (UK), Oddbins, TJ Hughes, Jane Normank, HomeForm Kitchen, and Focus DIY. At the same time, other retailers, such as HMV, Comet, and Mothercare have announced large-scale store closures, with the latter seeking to pull out of 110 high street locations to focus efforts on its out-of-centre stores. Although this later round of closures are fewer in number, many are important high street brands and signal continuing difficulties for the retail industry.

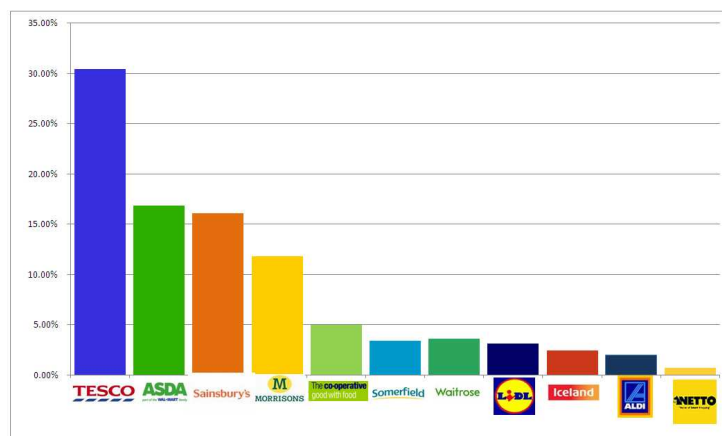
The closure of businesses has resulted in a significant “surge” in national town centre vacancy levels from circa 7% in 2007 to 12% by mid-2009. Although there have been fewer casualties in 2010/2011, vacancy levels have continued to rise in the more vulnerable centres. There has been a marked polarisation between centres in the north and centres in the south, with centres outside of London and the South East generally experiencing higher vacancy rates.

We consider the growth and future prospects for the food and non-food retail sectors in more detail below.

The Grocery & Convenience Goods Sector

The UK’s grocery sector has consistently been one of the strongest performing and most dynamic sectors of retailing and the economy as a whole. Overall it is estimated that groceries account for approximately 13% of all household spending, making it the third largest area of expenditure, after housing and transport. The figure below shows that the leading multiple grocery retailers currently account for 95% of the market, with the “top 4” (i.e. Tesco, Asda, Sainsbury’s and Morrisons) having a market share of around 75%.

Figure 1.2 UK Grocery Market: Market shares of major retailers



Source: SP and TNS Global (December 2009)

There have been dramatic changes in the location, scale and offer of foodstores since the 1980s. The growth of the sector up until the late 1990s was largely fuelled by the expansion of larger edge and out of centre superstores. Over the last decade, as the government's political and policy commitment to the urban renaissance and sustainable development strengthened, the grocery sector has been at the forefront of a number of key trends and innovations.

The table below summarises some of the key trends and business strategies that have helped to "fuel" the growth of this sector over the last decade.

Table 1.4 Major trends in the Grocery Sector

"Wave"	Description
Expansion through Acquisition & 'Alliances':	There have been a number of high profile takeovers over the last few years. For example, Morrisons acquired the Safeway chain in 2004, creating the UK's fourth largest supermarket group; and the Co-op Group acquired the 126 store Somerfield chain in October 2008, placing it amongst the 'top 5' grocery retailers. Examples of where retailers have formed business 'alliances' to increase market share include Boots and Waitrose. In this case Waitrose is to sell its branded food products in larger Boots stores and in return, the in-store Waitrose pharmacies are to be rebranded as Boots.
Diversification into non-food sales:	Non-food sales now account for an increasing share of the turnover of the top grocery retailers. Tesco and Asda already have a large non-food component, averaging 30%-50% of sales area in their larger stores and Sainsbury's is also increasing its non-food offer in store. As grocers expand their non-food ranges further, average store sizes increase. This has and will continue to fuel applications for extensions to existing stores. There may also be an increased move towards 'quasi-department store' food anchors in and/or on the edge of town centres, as well as traditional grocery retailers opening comparison goods only stores. Asda, for example, is rolling out its non-food only Asda Living stores as an alternative avenue for growth.

Growth of Convenience Stores:	The larger grocery operators have increased their market share of the convenience sector through acquisitions and new stores openings. The key players include Tesco ('Express' and 'One Stop'), Sainsbury's ('Local') and Marks & Spencer ('Simply Food'). Waitrose also announced plans in September 2009 to open a network of 300 small convenience stores between 185 - 370 m ² over the next 5-10 years, following successful trials of stores in Nottingham and Bristol. These 'higher end' convenience stores will represent a direct challenge to M&S Simply Food. Morrisons has also announced the trial of three 'M-Local' stores which, if successful, could be rolled out across the country to compete with the likes of Tesco and Sainsbury's. At the same time, 'traditional' convenience store operators, such as Budgens and Londis, are also planning to increase their store portfolios.
Growth of 'Deep Discounters'	The European discount food operators – Aldi and Lidl – have experienced significant growth in the UK over the last 5-10 years. They have changed their business models to suit the British consumer by introducing more ranges; improving their own-label products; enhancing store environments and design; and locating in more affluent areas. They account for over 6% of total UK grocery sales, but now face increased competition from the major grocers, who have responded by increasing their own-range "value" products.
Growth of Internet Sales	Based on the latest research by Experian, internet sales as a part of total retail sales has increased from 5.6% in September 2008 to 7.2% in June 2010, and are estimated to more than double to 16.2% by 2014. The major grocery store operators have led the way in online grocery retailing, and both Tesco and Asda have now supplemented this with a significant non-food range (for Tesco, under the "Tesco Direct" label). Whereas in the past the majority of internet-sourced goods have come from retail warehouses (such as, for instance, Amazon purchases), many online of the larger grocery stores source internet sales from their regular stores. This must be born in mind when considering the capacity for new floorspace.

The growth of the large multiples parallels a falling representation of smaller independent retailers and other food specialists on the High Street. According to Verdict Research, butchers, fishmongers and off-licenses have been the biggest casualties as consumers now generally look to supermarkets and convenience stores for these types of products. Those independent specialists that have survived in the increasingly competitive marketplace have generally been located in established, highly convenient and successful shopping locations, which benefit from a strong catchment population and provide a high quality of service and products to a loyal customer base.

Although the grocery sector has not been immune to the impact of the economic recession, compared with other hard-hit retail sectors the leading grocery retailers have generally managed to maintain their business, investment and expansion programmes over the last 2-3 years. If the trends identified by the table are set to continue, it is our view the grocery sector will be characterised by increased applications for extensions and mezzanine space to increase non-food sales; applications for new stores in areas where operators are seeking new or greater representation; the continued expansion of "local" convenience store formats; and increasing competition between the main grocery retailers and "deep discounters" for market share of "value-led" household spending, particularly if the economic recession is prolonged.

At the same time, there has been a growth in the number of mixed use developments in town centre and edge-of-centre locations that comprise a traditional foodstore as "anchor," along

with a mix of uses (primarily residential and office) either above the store, or as part of the overall development. Grocery retailers will be increasingly looking to develop “anchor” foodstores either in and/ or on the edge of smaller and medium-sized centres and market towns that do not have the critical mass or catchment areas to sustain more traditional department and variety store operators. These smaller centres may also have missed out on the latest wave of retail development and have limited prospects for alternative new retail investment over the short to medium term. Foodstores of an appropriate scale and in the right locations either in or on the edge of town centres can bring significant positive economic benefits to smaller and medium-sized centres. For example, research has indicated that “anchor” foodstores can help to “claw back” shoppers and expenditure from competing locations out-of-centres, and promote “linked trips” to the benefit of other shops and businesses in centres.

The Non-Food Retail Sector

The comparison goods sector is highly diverse and the line between town centre, edge-of-centre and out-of-centre retailing has become increasingly “blurred” over the last 10-15 years. In the early days of out-of-centre development, retail warehouses and retail parks were traditionally occupied by the large format (“bulky goods”) retailers in the DIY, hardware, furniture, carpets and electrical goods sectors. However, as “loopholes” in planning conditions were exploited and/or Open A1 permissions were granted in these locations, more “traditional” high street retailers have chosen to open larger format stores outside of town centres.

The table below summarises some of the key areas of comparison goods retailing that have driven, and will continue to drive demand for space at the national and regional level:

Table 1.5 Major trends in the Comparison Goods Sector

Retail Category / Sector	Description
Department Stores:	The mixed goods profile of department store operators has helped to insulate this sector against the impacts of the economic recession, particularly at the luxury end. Selfridges, Harvey Nichols, Harrods, The John Lewis Partnership (JLP) and House of Fraser are well positioned to “ride the economic storm” and have performed relatively well over the last 12 months.
Variety Stores:	This sector is highly diverse and remains critical to the success and attraction of many of Britain’s high streets and town centres. Following the loss of Woolworths in early 2009, the main players in this sector are Marks & Spencer (M&S) and BHS. Whilst some ‘discount’ variety retailers (such as Wilkinsons) are performing relatively strongly in the current recession, TJ Hughes has recently announced it is going into administration, indicating that even these retailers are getting squeezed. In contrast, ‘deep discount’ retailers (such as Poundland and £ Stretcher) are performing strongly. For instance, in addition to seeking further representation in the UK, Poundland recently announced their plans to expand into Europe under the ‘Dealz’ brand.
Fashion Retailing:	Traditional high street retailers such as Next, TK Maxx and New Look are increasingly “footloose” and are looking to open larger store formats in out-of-centre locations to “showcase” their entire product ranges. Some have sought to

Retail Category / Sector	Description
	expand their range, with Next selling home furniture and furnishings in their Next Home stores. There has also been increasing consolidation in the sector, with a number of different fascias and brands owned by one company. For example, the Arcadia Group is the third largest clothing and footwear retailer operating on the UK's high streets and comprises Dorothy Perkins, Top Shop, Miss Selfridge, Evans and Wallis amongst its brands. However, this can also represent a threat to the viability of high streets, as the failure of the holding company could result in the closure of a number of retailers. For example, the failed Icelandic Baugur Group had ownership and interest in a number of major UK retailers, including Karen Millen, Oasis, Warehouse Coast, Whistles and Hamleys.
'Value' Retailing:	A significant trend on the high street over recent years has been the increased polarisation in the retail market between the more expensive brands at one end of the spectrum and the value/discount clothing retailers at the other. This has driven the rise of the "value" sector players like Primark and Peacocks. Both of these retailers are looking for low-cost city centre sites, market towns and secondary shopping centres in large urban areas, where rents and overheads are relatively low. They have aggressive plans for expansion and are building market share on the back of a more price conscious-consumer.
DIY & Hardware:	This sector is characterised by large format retailers primarily located on the edge of, or outside of town centres. B&Q, Wickes and Homebase dominate this sector of the market. However, growth has slowed significantly since 2009 due to the impact of the recession and slump in the market for home-improvements. Over the last 12-18 months operators have looked to reduce store sizes, "handing back" space to landlords for conversion into smaller units, with a trend towards smaller format stores located in or on the edge of town centres (e.g. Robert Dyas). However, Focus DIY went into administration in May 2011 which demonstrates that this sector continues to face increasing pressure as a result of the economic climate.
Furniture & Floor Coverings:	Since the 1980s retailers in this category have increasingly moved away from town centres to cheaper out-of-centre locations. However, furniture specialists have borne the brunt of the current slowdown and the casualties in the last 12-18 months include MFI, Habitat, Sofa Workshop and HomeForm Kitchen. This sector is one of the most cyclical and could experience more difficult trading conditions if the recession is prolonged.
Electrical Goods:	The large format operators have focused their expansion strategies on new out-of-centre locations (e.g. Currys Digital, Comet and PC World). All the electrical goods retailers are facing increased competition from non-traditional retailers (such as supermarkets and Apple) and the Internet (including Amazon) over recent years. This has resulted in the rebranding of traditional high street store portfolios (e.g. Currys Digital) and, in some cases, the closure of stores in loss-making locations. Following losses of £9m over the past year, all 248 Comet stores have been put up for sale by its French owners.

Note: Also see Glossary of Terms.

It is forecast that consumers will be more selective about where they spend and this is likely to lead to a polarisation between the discount/ value end of the market and the luxury/ higher end. This will squeeze retailers in the "middle ground" who are increasingly competing for falling retail sales and market shares. Those retailers which do not have a strong identity and brand awareness amongst consumers are likely to struggle over the short to medium term.

At the same time, the “bulky goods” sector has suffered from the downturn in the housing market and the lack of working capital as a result of the credit crunch. The significant fall in the sale and purchase of homes has reduced demand for DIY and home improvements as households “tighten their belts.” The closure of Focus DIY is an indication that this sector will continue to experience trying times to come.

THE GROWTH OF INTERNET & NON-STORE RETAILING

Research indicates that at least one in three adults regularly purchases products over the Internet. The growth of Internet shopping has been fuelled over the last five years by the increased availability and uptake of faster and cheaper broadband services, as well as different options for accessing broadband services (ranging from computers and iPads, to mobile phones and digital televisions). At the same time, retailers are also marketing their online services more proactively and now view the Internet as another (and in some cases, the only) channel for future growth. This is particularly the case now that the early “teething” problems such as ordering, delivery and site security have improved. Based on the latest research by Experian, the table below shows internet sales¹ as part of total retail transactions has increased from 5.6% in September 2008 to 7.2% in June 2010.

¹ The ONS recently (early 2010) changed the methodology for calculating the value of internet sales. This resulted in a large increase in estimated internet retail sales and their share of the total market, from 4.9% at the end of 2009 to the 7.3% shown by the table. The upward revision reflects the inclusion in the new methodology of all sales made over the internet by individual businesses using information derived from the monthly ONS Retail Sales Inquiry (RSI).

Table 1.6 Internet Retail Sales, 2008 - 2010

		Average Weekly Value for All Retailing (£ m)	Average Weekly Value for Internet Retail Sales (£ m)	Internet Sales as a % of Total Retail Sales
2008	Sep	5,200	289.8	5.6
	Dec	6,800	435.1	6.4
2009	Mar	5,100	336.8	6.6
	Jun	5,400	307.4	5.7
	Sep	5,300	337.7	6.4
	Dec	7,000	511.7	7.3
2010	Mar	5,300	362.1	6.9
	Jun	5,500	397.7	7.2

Source: Experian Retail Planner Briefing Note 8.1 (August 2010) Derived from ONS, Retail Sales Statistical Bulletin (July 2010).

There is, however, a high degree of uncertainty about future trends in internet usage and non-store shopping in general.

For convenience goods, recent research indicates that the UK online grocery market has grown by 85% between 2006 and 2009, from £2bn to £3.7bn and some 12.8% of the UK adult population shopped online for food and groceries in 2009. Despite this strong growth, the Institute of Grocery Distribution (IGD) estimates that online grocery shopping currently only represents a small proportion (circa 2.6%) of the total UK grocery market. Nevertheless, with increasing broadband penetration and changing shopper lifestyles, the internet looks set to become more important as a grocery retail channel. For example, forecasts by Experian indicate a doubling in online sales to £7.2bn by 2014 and an increase in the proportion of the population shopping online to 16.2%. By way of comparison, the 2006 *Retail and Town Centre Study* estimated internet sales accounted for approximately 5% of retail spend.

Currently many retailers source their internet sales through existing stores rather than dedicated warehouses so it is difficult to assess how the capacity and demand for retail floorspace will be affected by the forecast growth in Internet and other non-store retail sales over the medium to long term. Tesco, Sainsbury's and Asda have led the way in online grocery retailing. The source of internet purchases for Tesco and Sainsbury's are normally picked from existing stores open to the public, whereas specialist online grocery retailer Ocado distributes Waitrose products mainly from warehouses rather than stores.

Both Tesco and Asda have also significantly expanded their non-food Internet offer. For example, in 2006 Tesco re-launched the internet brand of their business as Tesco Direct, which brought all its non-food categories together and expanded the range and offer. As a result, the online grocery market is becoming inter-linked with comparison goods purchases, increasing its competitiveness. It is expected that the arrival of Amazon onto the grocery market and the potential entrance of Morrisons will not necessarily boost spend, but will instead take share from rivals.

As stated above, it is difficult to assess the impact of online grocery sales on the capacity and demand for new retail floorspace as many of the larger grocery stores source internet sales from their regular stores rather than from dedicated warehouses. However, this position is changing rapidly. For example, Asda is to open a warehouse dedicated to internet orders only in Enfield. If this move away from stores to warehouses continues, then demand from operators for new retail floorspace and stores could ease over the medium to longer term.

SMALL RETAILERS AND SECONDARY SHOPPING LOCATIONS

Research published in November 2004 by the National Retail Planning Forum in the report 'The Role and Vitality of Secondary Shopping – A New Direction' concluded that over the previous 10 years, there had been a significant change in secondary shopping. In such locations, the number of retailers had declined, but the number of service businesses had increased. The result was that in general, shop vacancy rates in secondary shopping areas had fallen – although there were specific pockets of decline and high vacancy, usually easily explicable by locational factors; such as being separated from the remainder of the town centre by a busy access road. The research also concluded that secondary shopping areas are much more diverse in their composition than prime retail areas, and are heavily dependent on independent businesses. A number of recommendations were put forward for enhancing the prosperity of secondary shopping areas. In summary, these focused on:

- Creating a coherent pedestrian environment through breaching barriers to easy pedestrian movement, introducing new pedestrian flow generators, and improving linkages with the prime retail areas;
- Managing change to non-retail uses where appropriate;
- Creating financially viable developments, through introducing new value generators to form mixed use schemes;
- Improving the public realm through new investment;
- Supporting independent businesses by providing low cost business support services;
- Applying asset management principles and niche marketing;
- Using new methods of leasing, so as to improve landlord control of repairs and maintenance;
- Obtaining specialist advice on the impact of proposed new retail developments;
- Evolving more sophisticated planning policies for change of use;
- Applying town centre management;
- Ending differential pricing under which the major food retailers charge higher prices in their small local stores than in their car-accessed superstores;
- Applying the sequential approach and controlling development.

APPENDIX 10: COMMERCIAL LEISURE TRENDS

Leisure uses¹ make an important contribution to the vitality and viability of centres by complementing and reinforcing the attraction of retail and other town centre uses. They play an important part in both the daytime and the evening economies of centres.

The commercial leisure sector has enjoyed significant growth since the early 1990s, fuelled by buoyant market conditions, growing levels of disposable incomes and low unemployment. Much of this growth has been fuelled by an increase in the number of 'cash-rich, time-poor' consumers who have been prepared to pay a premium price for convenient services in order to save time. In order to maximise free time, consumers generally combine leisure activities as part of the overall "going out" experience, often as part of shopping trips. The range of leisure choices has also grown considerably leading to an increase in competition in the industry.

As for the retail sector, the recession has brought many challenges for the industry. On one hand, the leisure industry is considered to be particularly exposed to the economic downturn due to the discretionary nature of leisure expenditure. Notwithstanding this, leisure activities remain an important lifestyle choice for many consumers, who will continue to prioritise leisure over other areas of spending.

Leisure is one of the most rapidly expanding sectors in the UK economy and provides an exciting opportunity for town centres to benefit from continued growth and innovation.

The following provides an overview of some of the key development trends in a range of commercial leisure sectors over the last decade or more.

CINEMA SECTOR

Following a period of steady decline during the 1980s, the significant growth in modern multi-screen cinemas in the 1990s resulted in a resurgence in cinema audiences. This, in turn, was fuelled by the increase in the number of Hollywood 'blockbusters' and new developments in cinema technology, such as digital surround-sound and, most recently, 3-D screen technology.

Most multiplexes opened during the 1990s were located on large out-of-centre and edge-of-town sites, often as part of shopping centres, retail parks or mixed leisure schemes featuring bowling, nightclubs and restaurants (such as, for example, Star City in Birmingham). Cinemas are now an integral part of the tenant mix for major shopping centre schemes (such as, for example, The Chimes in Uxbridge and Westfield in West London). The large audience throughput of a multiplex cinema generates footfall in centres outside of shopping hours and helps generate linked trips and spin-off expenditure to other shops and facilities, including cafes and restaurants.

¹ Commercial leisure uses are defined by PPS4 as comprising cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls. PPS4 also applies to arts, culture and tourism uses (including theatres, museums, galleries and concert halls, hotels, and conference facilities).

Multiplexes have also been particularly successful in attracting shoppers and visitors into 'dead' areas of shopping centres, such as upper levels or the ends of malls. As a result they have been introduced to anchor and re-brand unsuccessful shopping centres as part of refurbishment schemes. Locating a cinema within a town centre or shopping centre is therefore often mutually beneficial, contributing to an increase in footfall and sales across the centre and also helping to underpin the evening economy.

Although cinema audiences grew significantly during the 1990s, the UK cinema market has traditionally been dominated by a handful of multiple operators including Cineworld; Terra Firma Capital Partners (Odeon and UCU Cinemas); Vue (who operate the multiplexes in Westfield's Stratford and White City schemes); and Showcase (UK arm of National Amusements of the USA). For example, from its beginnings in 1995 Cineworld now operates some 78 cinemas in the UK and accounts for more than one quarter of the cinema market. It is the UK's largest and only publicly quoted cinema chain, with interim results for the first half of 2011 showing a 2% increase in box office receipts to circa £114m. Its most recent and planned openings include the 11-screen cinema on the edge of Leigh town centre in Wigan Borough, which opened in November 2011 and forms part of a wider mixed use scheme comprising Tesco Extra and Class A3 units; a new cinema in Aldershot in 2012; and as part of Quintain's London Designer Outlet in Wembley in 2013.

It is estimated that there are over 770 cinemas in the UK with a total of 3,610 screens. Nevertheless, the most recent research by Dodona (a specialist consultancy in the cinema industry) indicated that the market had reached a plateau in 2010.

Table 1L: UK Cinema Market, 2003 -2008

	2003	2004	2005	2006	2007	2008
Screens	3,318	3,342	3,357	3,440	3,514	3,610
Admissions (£m)	167.5	171.5	164.7	156.6	162.4	164.2
Average Ticket Price (£)	4.43	4.49	4.68	4.87	5.05	6.18
Gross Box Office (£m)	742.000	770.000	771.350	762.300	820.000	850.200
Spend per head (£)	1.70	1.75	1.80	1.85	1.90	1.95
Screen Advertising Receipts (£m)	65.000	70.000	70.000	85.000	90.000	86.500
Admission per person	2.81	2.86	2.73	2.58	2.63	2.61
Admission per screen	50,482	51,317	49,059	45,523	46,223	45,491

Source: Dodonna Research (2009)

As the table shows, there were 3,610 cinema screens across the UK in 2008, of which three-quarters were multiplexes. The remainder are traditional cinemas that have been converted to multi-screen use, large format screens such as IMAX, and screens in mixed-use venues such as arts centres. The cinema industry has not been immune from the recession and there were some closures during 2008, the majority being art centre venues rather than high street chains. The current economic downturn has also hit advertising revenues, but in general the industry appears to be in good health.

Over the last couple of years, cinema operators have also introduced changes to the cinema experience, including premium seating areas and enhancing the range of refreshments such as alcohol and higher quality food. For example, Vue Cinemas introduced their 'Evolution' concept which provides a mix of seating types comprising bean bags and sofas as well as regular seats. Cineworld has also introduced the 'Screening Room' concept, which offer leather chairs and table service (tickets are priced at circa £17 and children are not permitted). There are plans for 10 of these 'Screen Rooms' across the country, and the first 558 sqm (6,000 sqft) cinema opened in June 2011 in the Brewery, Cheltenham.

Another development has been the introduction of 3D films, which are attracting premium ticket prices from operators. In the future, Dodona predict that operators of traditional cinemas, particularly those with only one or two screens, will find their competitive position eroded, especially if family audiences start travelling longer distances to larger cinemas to obtain the latest 3D experience.

Research by Dodona also indicates that fewer multiplex cinemas are now being developed and there has been a growth in smaller (Digital) cinemas to serve smaller catchment areas. These Digital cinemas are more flexible and less "space-hungry" as they do not require the large sloping auditoriums needed to accommodate traditional projectors. There are therefore opportunities for the modern cinema offer to be provided in existing buildings. For example, HMV announced recently that it was testing a three screen art-house format above its Wimbledon music store.

Investment in new cinemas is continuing but this is no longer producing such high levels of growth. The focus has switched to replacing or relocating existing cinemas. There is also some investment in under-served areas, however Dodona consider this to be merely offsetting a decline in existing markets. Over the short to medium term, future cinema projects are likely to be impacted by the level of availability of finance for property developers, although it would appear that investment in better seating, better bars and cafés and new buildings is continuing.

CAFES, RESTAURANTS & BARS

UK household spending on leisure services continues to be dominated by eating and drinking out. Even in the context of the current economic recession this sector has remained buoyant. There are currently an estimated 22,750 restaurants and 58,000 pubs in the UK². In 2007, the average food and beverage sales in restaurants was around £400,000 per annum made up of roughly 75% food sales and 25% beverage sales. Food sales in pubs accounted for approximately 25% of returns in 2008, and this percentage is increasing year-on-year³.

Some of the trends influencing the pub trade over recent years include:

- More flexible opening hours (resulting from licensing reforms implemented in November 2005), combined with pressures arising from lower alcoholic drink prices (particularly in

² Source: Market & Business Development UK Restaurants Market Development Report (March 2009) and UK Public Houses Market Development Report (August 2010)

³ Source: Savills Commercial Leisure Bulletin (May 2008)

supermarkets), has resulted in a number of pub operators widening their food and non-alcoholic beverage offering (to provide, for example, breakfasts and morning coffee). It has also fuelled the growth of so-called gastro-pubs as eating-out destinations (such as the All Bar One and Pitcher and Piano formats). This has led to a blurring of the dividing line between pubs and restaurants and increased competition for customers. For instance, major takeovers in 2010 include Italian restaurant chain Carluccio's £90.3m takeover offer from Landmark and Mitchells and Butlers selling 33 pubs to Stonegate Pub Company.

- Increased consolidation in the pub industry over the last five years, which has impacted on the smaller independent operators. A total of 1,560 pubs are estimated to have closed in 2010, which is lower than the peak of 2,600 in 2009. However, this rate may increase, with Punch Taverns recently announcing that it tends to sell approximately 2,300 pubs over the next five years. An estimated 44,000 jobs have been lost across the sector in the last five years and a further 43,000 are projected to go in the next five years⁴.
- Financing is required for the purchase of anything more than "*bottom level*" pubs and as a result transactional sales between operators is relatively rare. Instead, the main trend has been for sales of pubs for conversion to alternative uses such as, for example, convenience foodstores (e.g. Tesco Express and Sainsbury's Local). According to Savills, between January 2011 and June 2011 the sale of pubs for alternative uses was at 65%, compared to 60% recorded for the same period last year.
- The Home Office has put in place a much more aggressive policy towards the pub industry. Powers for local authorities to establish Alcohol Disorder Zones (ADZ) are included in the Violent Crime Reduction Act (2006), which also has a charge on pubs and bars in a designated area to pay for additional policing, environmental and other services in the neighbourhood.

The recession and smoking ban has impacted on drinks sales and rental revenues, which has further accelerated pub closures over recent years. However, on the plus side, this has meant that smaller multiples have been able to acquire premium sites at bargain prices and value led brands such as JD Wetherspoon have achieved significant sales growth and continue to expand.

The recession has resulted in mixed fortunes for the restaurant sector. The main casualties appear to have been at the more exclusive end of the market, as well as smaller companies with less established brands. Some of the key trends in this sector over recent years include:

- Multiple brands are seeking to trade through the uncertainties by offering significant promotions and discounts (e.g. Pizza Express). However, targeting customers whose primary motivation is discounted prices may not provide a long-term customer base.

⁴ Business in Sport & Leisure Handbook (2009)

- Customers are becoming more discerning about where they go and what will deliver value. Two recent success stories are Jamie's Italian and Cote, which seek to deliver value in terms of menu, service and cost. There has also been a growth in 'all-you-can-eat' style restaurants which are aimed at offering value for money. For example, the Taybarn brand owned by Whitbread is currently trading very strongly and the brand is pursuing aggressive openings in the current market.
- The fall in property prices has also provided an opportunity for stronger niche operators to expand their brands due to lower overheads.
- For families in particular, going out for a meal has become too expensive, and many have switched to staying at home with a takeaway which has increased sales for businesses such as Domino's.

Changes in the Use Classes Order (UCO) allow local authorities greater control over the growth and location of new cafés, restaurants, takeaways and public houses in their town centres. The main change to the UCO was the replacement of the former class A3 (food and drink) by the amended

- **Class A3** - restaurant and café uses for the sale of food for consumption on the premises;
- **Class A4** - limited to drinking establishments, such as pubs and wine bars; and
- **Class A5** - limited to hot food takeaways.

Whilst bars and takeaways are able to revert to restaurants without requiring planning permission, moves in the other direction require LPA approval. It is intended that these changes will help to prevent the unfettered growth of branded bars and poor quality takeaways in town centres (particularly in shopping areas). It will also help to limit the anti-social impact on residential amenity and visitors' enjoyment of town centres, particularly as part of the promotion of evening economies. Other changes include the classification of Internet cafés as A1 and nightclubs as sui generis (meaning uses on their own). Changes to, or from, these sui generis uses will therefore always require planning permission.

The Use Class changes increase local authority control on the high street by limiting the ability of operators to change use without planning permission. This provides greater powers to the Council to monitor and control the potential growth of A4 and A5 uses in its town centres, but limits the flexibility with which the industry can change formats to meet new demands. Current licensing reforms also transfer responsibility from magistrates to LPAs. The Government believes that operators in the same area will choose to set different hours of operation and that this will therefore reduce the concentrations of people leaving licensed premises at the same time, which can often result in flashpoints of crime and violence in centres. Together, the planning and licensing reforms allow local authorities considerable control over the leisure and entertainment industry.

NIGHTCLUBS

As with the pub sector, the nightclub industry has continued to see consolidation amongst operators. The leading brands (such as, for example, Oceana and Liquid) are maintaining their position, but the smaller chains and particularly independent operations are feeling the severe economic pressures of competition from longer opening hours in pubs and bars.

BINGO

Bingo is one of the oldest forms of gambling in the UK. There are over 675⁵ licensed bingo clubs in operation and over 1,000 other clubs and smaller institutions where bingo is played. In 2005 there were over 78 million bingo club admissions, and it is estimated that there are currently about 3 million active bingo club members.

Bingo has traditionally had a downmarket image and this has limited its appeal as a night out for the majority of the population. In response, Bingo operators are increasingly marketing their clubs at a younger, predominantly female audience, in order to increase admissions and market share. There has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes.

Initially, Bingo halls have been located in town centre sites at either ground or first floor level, however there is an increasing trend for operators to seek free standing edge of centre sites which can provide free car parking for their proprietors. This is not necessarily surprising, bearing in mind the limited amount of spin-off trips to adjacent retail, leisure and town centre uses derived from Bingo halls.

Recent research by Mintel indicates that the industry has experienced a fall in revenues and admissions as a result of legislative changes such as the ban on smoking in public places and the rise of the online gambling. The recession and Internet gaming sites have also impacted on the Bingo market. Although operators have attempted to diversify their offer to halt the decline in participation rates, it would appear that this has merely slowed the decline and operators will continue to struggle in tough market conditions.

CASINOS & GAMBLING

Gambling represents a significant element of the leisure industry with an estimated turnover of over £84.2 billion in 2006/07. Apart from Bingo, the main sectors of the gambling industry comprise Casinos and betting shops. We briefly describe the key trends in these sectors below.

There were an estimated 144 casinos in the UK in 2008. The sector is dominated by three companies:

- the Gala Group with 28 casinos throughout Great Britain;
- Grosvenor Casinos with 32; and
- Stanley Casinos/ Stanley Leisure/ Genting International (which amalgamated in 2007) with a total of 46.

⁵ The Gambling Commission (March 2009)

- There were over 15 million visits to casinos in Great Britain in 2006/07 and the drop (money exchanged for gaming chips) amounted to £4,314 million in the same year⁶.
- Horse racing is second only to football as the most televised sport in the UK and accounts for some 70% of the turnover of betting shops. There are currently 61 racecourses in Britain, compared to 29 licensed greyhound courses⁷. Betting on horseracing in 2004/05 was over £10bn which was bet off-course mostly in the 8,500 licensed betting offices in Britain, with a further £120m bet with the Tote on-course⁸.

TEN PIN BOWLING

Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years and remains a strong family and group activity. After a period of decline during the early 1990s, there was a period of new investment and a number of high-end quality venues opened. There are estimated to be over 269⁹ bowling centres (5,005 lanes) currently in operation across the UK. This is higher than the previous peak in the 1960s due to the introduction of computer scoring systems and the investment by chains such as AMF Bowling.

Although ten pin bowling has failed to appeal to a wide cross-section of the population as a regular 'night out' activity, there are a number of strong operators who are seeking to increase the attraction of such facilities through complementary uses, which is beginning to generate customer demand.

The current trend is to build large entertainment complexes to attract people to many different activities. Bowling centres therefore tend to form part of leisure developments that include multi-screen cinemas, restaurants and night clubs offering a choice in leisure entertainment. The critical mass of leisure uses under one roof helps to underpin the viability of ten-pin bowling centres, which can struggle as standalone attractions. These centres generally require large floorplates (from circa 2,500 - 4,500 sqm).

At the other end of the spectrum are the small specialist bowling operations. For example, the Bloomsbury Bowl Lanes in Bloomsbury, London offers a 50's American-themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.

The future growth of this sector will depend on consumer demand, as well as market and investor confidence.

HEALTH & FITNESS CLUBS

The health and fitness market has been through a series of peaks and troughs since the sector first gained popularity in the mid-1990s. Since the start of the recession in 2008 the fitness industry has grown its total market value to £3.81 billion (an increase of 4%); increased its

⁶ The Gambling Commission (March 2009)

⁷ The British Horseracing Authority & Business in Sport & Leisure Handbook (2009)

⁸ The British Horseracing Authority (2009)

⁹ Business in Sport & Leisure Handbook (2009)

member base by 2% to 7.3 million; and increased the total number of facilities by 1.7% The proportion of the population with a gym membership is currently estimated to be 12%¹⁰.

There are currently an estimated 5,852 private health clubs and public fitness centres facilities in the UK, a small net decrease from the 5,885 facilities last year. Although there have been recent closures, it is estimated that some 149 new public and private facilities opened between April 2010 and March 2011, up from 114 in 2009. The main players in the market currently include:

- **Esporta, Greens & David Lloyd Leisure** – at the premium end of the market focus on health, racquet and tennis clubs;
- **Virgin Active & Nuffield Health** (previously Cannons) – dominate the mid-range family-oriented health and fitness market; and
- **LA Fitness & Fitness First** – operate smaller in-town clubs at the more value end of the market.

Other independently owned multi-chain health club operators include Bannatyne's Health Clubs with other 60 centres across the UK.

The rapid growth of this sector has also been characterised by a marked shift in the location of clubs from out-of-centre locations to town centres, often as part of wider mixed use developments. This is helping to create a wider range of attractions and activity in town centres, particularly in the evenings and at weekends. More flexible planning policies will therefore need to be introduced which help to encourage an element of such uses within existing buildings or as part of mixed use schemes.

However increased competition for members and market share, compounded by the economic downturn, has resulted in the weaker clubs with low membership levels losing out. For example, the Esporta chain was placed into administration in 2008, but the business failed to attract a buyer and it has since been taken out of administration by its main creditor, who is trading the business until a buyer can be found.

There is also evidence that value and budget operators are entering the health and fitness market and are actively looking to expand their businesses throughout the UK. The new breed of budget clubs include EasyGym, Pure Gym, Fitness 4 Less, Fitspace, TruGym and SimplyGym. The business model aims to appeal to a wider market with reduced monthly subscriptions of between £10 and £20 on average and 24-hour opening. Although these clubs provide a basic offer (for example, no swimming pool, sauna or steam rooms) they appear well suited to the current economic downturn and could challenge the market share of the established value-end operators. A good example is PureGym which opened its first gym in Leeds in 2009 and has followed this with openings in Manchester, Edinburgh and Wolverhampton. It currently has 15 operational gyms, with plans for 30 by the start of 2012 and a further 40 to open by 2013. In response, Fitness First has announced that it will be entering into the budget gym market through its Klick Fitness concept.

¹⁰ The Leisure Database Company – 2008 FIA State of the UK Fitness Industry Report

Although the number of new openings in the sector remained static in 2008 and fell sharply in 2009/10, there still remains demand for an affordable health and fitness product. This is further underpinned by the Department of Health's (DoH) commitment to tackling health issues such as '*Foresight Project on Obesity*' and advice from National Institute for Clinical Excellence (NICE). With a projected growth in GP exercise referrals, this is likely to fuel gym expansion and membership for the foreseeable future.

APPENDIX 11 - OPPORTUNITY SITE ASSESSMENT

The following section considers a range of sites which may have the potential to accommodate some of the identified capacity for new retail floorspace in the District up to 2031.

Section 8.0 identifies a need for between 4,555 – 9,109 sqm (net) convenience goods floorspace and 10,830 sqm (net) comparison goods floorspace in the District up to 2031.

NEWMARKET

As the largest town within the District we estimate that Newmarket should accommodate between 2,080 – 4,160 sqm (net) convenience goods floorspace and 8,651 sqm (net) comparison goods floorspace by 2031.

The following sites in at the edge of Newmarket Town Centre have been identified by the Council and are discussed below with respect to their potential for accommodating an element of the forecast need for new retail and/or leisure floorspace:

- Market Place Car Park/ Market Square
- Land between High Street and Fitzroy Street.
- Land west of Wellington Street and the High Street
- TK Maxx (former Waitrose)
- Land South of High Street (including Palace House and Trainers House)
- All Saints Road Car Park and Snooker Club
- Fitzroy Paddocks/Queensbury Lodge Stables
- The Severals Recreation Ground
- Technical Institute/Conservative Club, Fordham Road

TOWN CENTRE OPPORTUNITY SITES

Market Place Car Park/ Market Square is a 0.18ha site located adjacent to The Guineas Shopping Centre. It currently comprises a 58 space car park and accommodates the town's twice-weekly open air market. The site was granted planning permission in April 2008 for a two-storey 1,486 sqm (net) retail unit and a large store on half of the square next to the existing Marks and Spencer's store and six kiosk-style shops facing out onto the retained area of the existing market square car park (Reference: F/2007/0506/FUL). In 2008 Centenary Asset management and Active Retail Fund, then owners of the Guineas Shopping Centre, announced their decision put any development on hold as a result of the financial crisis. An application to extend the timeline to implement this permission was granted in August 2011, subject to legal agreement (Reference F/2011/0055/EOT). The Town Council have recently announced their intention to relocate the

market to the High Street. This could effectively open up this area for more intensive retail and/or leisure development.

Land between High Street and Fitzroy Street is a 1.1ha site located at the south western end of the High Street and currently comprises a 125-space car park, Memorial Hall and Gardens, De Niro's nightclub and Millionaire's Bar. It lies within the Newmarket Conservation Area and parts of it are considered areas of high conservation significance (Grosvenor Yard, Fitzroy Street and the High Street). The site makes a positive contribution to the Conservation Area and the area of the site outside of the Conservation Area would have an irregular shape without frontage to the High Street. The site is also in multiple ownerships and delivery for redevelopment would require complex site assembly.

Land west of Wellington Street and the High Street is a 0.5ha site which lies directly southwest of the Guineas Shopping Centre. It is bounded by Wellington Road to the east, New Cut to the east and the High Street along the south. The site currently accommodates a range of independent retail uses at ground floor along Wellington Street, a large Store Twenty one which fronts the High Street and provides service access for units fronting the High Street. The 2006 Retail Study considered that the site could present a good opportunity to accommodate a retail led mixed use development including an element of leisure uses. We understand that the site lies in multiple ownerships and this may make prospects for delivery difficult during the lifetime of the development plan. However, if a proposal came forward to develop the site, it would be a good opportunity to enhance the area through retail-led mixed use development including perhaps a leisure element. This could help integrate Wellington Street more successfully into the overall shopping area.

The **TK Maxx (former Waitrose)** is a 0.26ha site in the town centre. It was previously occupied by Waitrose and is currently leased to TK Maxx. The site was occupied by TK Maxx in 2006 and this operator has circa 10 years remaining on their lease. The unit is owned freehold by FHDC and is located outside of the Conservation Area. The SSA DPD identifies that this site/unit will be redeveloped for appropriate town centre uses, having regard to the Conservation Area and adjoining Palace House and Palace House Stables (SSAN/26). SSAN/26 does not include the adjacent Council-owned car park as part of the site. As landowner of the site, the Council may have the ability to either bring it forward for redevelopment, or to promote an alternative use, subject to consideration of the likely significant impacts of such a change upon the terms of its long term lease and the wider impact upon Council finances and operations. Based on our high level review and we consider that it could represent a suitable and viable location for a new cinema over the long term, but this is dependent on the relocation of TK Maxx to a suitable unit in the town centre.

EDGE OF CENTRE OPPORTUNITY SITES

Land South of the High Street (including Palace House and Trainers House) is located south of the High Street and is bounded by residential units fronting Lisburn Road to the north and All Saints Road to the South and the Church of England Primary School to the east. The site includes the Grade II listed Palace House Stables and All Saints Primary School playing School.

Based on our review and understanding of this site's development potential, along with discussions with the local planning authority, we consider that the key issues here are as follows:

- Although the paddocks are not part of the school, we understand that there is a desire by the school to use the site and discussions are being held between SCC and FHDC. Depending on the outcome of these discussions it may be that the playing fields will not be 'available' for redevelopment.
- The wider site and Palace House Stables have been identified for the 'Home of Horse Racing' project and we understand that there are plans to convert the stables into a tourist attraction, including museum, art gallery, study centre, equestrian training centre and ancillary retail. The site is covered by a 'saved' Local Plan policy and was included in the draft SSA DPD for these purposes. Planning permission has subsequently been granted for the equestrian training element of these plans.
- The need to retain the Listed Stables would prevent access to the site from Palace Street. The Vicarage Road access is also limited. We nevertheless understand that the site could be accessed from the car park behind TK Maxx. In this context we therefore consider that the comprehensive redevelopment of this site would need to be considered alongside the treatment of the TK Maxx unit to create a larger and more accessible site. Unless the access issue can be addressed then we do not consider that this site will represent a viable option for comprehensive development for either a retail or leisure operator.

All Saints Road Car Park and Snooker Club is a 0.7ha site which lies south of All Saints Road, to the east of the High Street. It accommodates a former snooker centre and circa 160 space car park in the ownership of the Council. Planning permission was granted in 2009 for a residential scheme of fourteen units on the site of the former snooker centre site and this is now under construction (LPA reference F/2009/0322/FUL). An element of this site is therefore unavailable. The remainder of the site continues to operate as an important town centre car park and FHDC have not indicated that it is currently available for redevelopment. The practicalities of alternative parking provisions are also questionable. If the car park was available, within a longer term parking strategy for the town, we consider that it could have the potential to accommodate new leisure development (potentially a cinema). However, we acknowledge that the All Saints Church and former snooker site represent a physical and visual barrier to the site from the town centre. Any redevelopment of this site would require sensitive design to encourage linked trips to the town centre and would have to address other issues including access, parking and impact on residential amenity.

Fitzroy Paddocks /Queensbury Lodge Stables is on land to the south of Black Bear Lane. It is located outside the proposed town centre boundary but within 300m of the PSA. It can therefore be defined as edge of centre for the purpose of our assessment. The site is in part currently occupied by the derelict and vacant Queensbury Lodge Stables together with a large paddock area to the rear. Most of the site is also within the town's Conservation Area.

The site is large enough to accommodate suitably large retail/town centre floorspace provision. Due to its proximity to, and potential for strong linkages with the PSA, appropriate retail development here could bring added benefits to the town centre's vitality and viability.

The site is covered by 'saved' Policy 12.4 of the adopted Local Plan which seeks to prevent the change of use of 'racehorse training establishments' and it has not been replaced by the policies in the LDF Core Strategy, or the recent LDF Joint Development Management Policies Preferred Options DPD published for consultation (we refer to Policies 21, 47 and 48).

The Queensbury Lodge site is also part of the Newmarket Conservation Area and the paddock area has been identified as '*Open Space to be Retained*'. Queensbury Lodge Stables and the Lodge and Cottage associated with the yard are all Grade 2 listed buildings and are on the Buildings at Risk Register.

The fact that an application has been recently submitted with a named operator (ASDA) indicates that the site is available and is viable for the proposed development. However, there are clearly important development plan policies that need to be addressed, not least whether the Council will allow for an exception to saved Policy 12.4 of the adopted Local Plan and conservation/heritage concerns. In our judgement, these can only be resolved by the local planning authority.

The Severals Recreation Ground is located to the north of the clock tower, between Fordham Road and Bury Road. The site is owned by Newmarket Town Council and the Jockey Club, and as far as we are aware it is not being promoted as an alternative location for commercial development. It is designated as an important amenity area in the Local Plan ('saved' Policy 10.5 and there is no indication that this will be relaxed. It is also identified as an area of important open space to be retained in the recently adopted Newmarket Conservation Area Appraisal.

Technical Institute/Conservative Club, Fordham Road is a triangular site at the edge of the town centre, between the High Street and Waitrose. It is bounded by Exeter Road, Fordham Road and Fred Archer Way. The site currently comprises a newly built 75-bed Premier Inn along Fred Archer Way and retail units (containing Prezzo, Bathstore and Majestic Wines) along Fordham Road. The former Conservative Club fronts the Exeter Road side of the site and has planning permission for a minor extension and change of use to provide two A1-A5 units of 110 and 447sqm respectively (planning reference F/2009/0163/FUL). There is also an office block on site. As the majority of the site is built out we consider that there is limited scope to accommodate additional retail development on site above what has already been granted permission.