North Northamptonshire Retail Capacity 2014 Update

Final Report



On behalf of

North Northamptonshire Joint Planning Unit

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Office Address: 16 Brewhouse Yard, Clerkenwell, London EC1V 4LJ
T: +44 (0)207 566 8600 E: london@peterbrett.com

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	Name	Position	Signature	Date
Prepared by:	Adam Bunn	Principal Planner		Oct 2014
Reviewed by:	Peter Keenan	Senior Associate		Oct 2014
Approved by:	Chris Quinsee	Partner		Oct 2014
For and on behalf of Peter Brett Associates LLP				

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1 Introduction & structure of report

1.1 Introduction

1.1.1 The North Northamptonshire Joint Planning Unit (NNJPU) has commissioned Peter Brett Associates (PBA) to provide an update to quantitative retail capacity forecasts for the North Northamptonshire area, in order to inform the JPU's emerging Joint Core Strategy (JCS). The update follows on from previous capacity work undertaken by Roger Tym & Partners (which is now part of PBA), as follows:

- The North Northamptonshire Roles & Relationships Study (2005), which identified the quantum of retail floorspace which could be supported across the North Northamptonshire Growth Area (NNGA) , within the context of specific roles identified for particular centres in the NNGA, and the need for centres to accommodate the demands for new development generated by the high levels of population growth forecast;

- An update study in 2006, which took into account updated forecasts in respect of expenditure growth and a refined housing growth trajectory for the period to 2021;

- The North Northamptonshire Retail Capacity Study (NNRCS) (2011), which provided a revised assessment of quantitative retail needs, informed by a new household telephone survey, and having regard to major retail developments in the region, such as the completion of Willow Place in Corby, which have taken place subsequent to the 2005 Study and 2006 Update; and

- The North Northamptonshire Retail Capacity Update (NNRCU) (2012), which updates the figures in the NNRCS to take into account revised forecasts of population and housing growth, alongside new statistical inputs.

1.1.2 The NNJPU have now requested a further update to the capacity forecasts, the principal impetus for which being the granting of permission by the Secretary of State for a major new retail-led development at Rushden Lakes, in East Northamptonshire. This application had not been submitted at the time of the NNRCU. The approved development at Rushden Lakes will provide additional retail and leisure development in the southern part of the NNGA, and will in turn provide greater emphasis to Rushden a a growth town. It will also be expected to act as a significant 'claim' on the total amount of comparison goods expenditure which the NNRCU identified as being available to support new comparison goods floorspace in the NNGA.

1.1.3 As part of our refresh of the figures, we have also incorporated the JPU's latest housing growth trajectory, and updated estimates of spending per capita on comparison (non-food) and convenience (food) goods, and 'special forms of trading' (SFT) such as online shopping, all of which are provided by Experian. The report also takes into account other planning permissions for new retail development which have been granted subsequent to the completion of the NNRCU. We discuss these further in the following section.

1.1.4 The quantitative retail capacity figures set out in this report therefore supersede those in the NNRCU. The terms of reference for this update do not extend beyond updating the quantitative retail capacity forecasts, and therefore we advise that the findings of this report are considered alongside the wider conclusions and recommendations set out in the NNRCS.

1.1.5 As noted above, the Rushden Lakes decision is expected to inform a revised spatial strategy for North Northamptonshire, which has implications for the location of future retail growth across North Northamptonshire. Our previous assessments have assumed that retail growth will be split between the centres of Kettering, Corby and Wellingborough; however the implications of the Rushden Lakes decision is that such an approach may no longer be the most salient. In order to assist the JPU in

providing a flexible approach to planning for new retail development, in this assessment we present our comparison (non-food) and convenience (food) capacity forecasts split between the 'Northern Sub-Area' (which covers Kettering, Corby, and the Rural North, Oundle & Thrapston parts of East Northamptonshire) and the 'Southern Sub-Area' (which covers Wellingborough and Four Towns (Rushden, Higham Ferrers, Irthlingborough & Raunds) part of East Northamptonshire).

1.2 The NNCA

1.2.1 For ease of reference, a plan of the study area which forms the basis of our assessment is provided at **Appendix A.** The study area is split into 11 survey zones, and it is this study area which was used for the household telephone survey which was undertaken in support of the NNRCS (and NNRCU). We term this study area the North Northamptonshire Catchment Area (NNCA). The NNCA extends into parts of neighbouring authorities, including Rutland and Daventry. However, our capacity forecasts are derived from the market share of the centres in North Northamptonshire only.

1.2.2 **Table 1.1** summarises the survey zones and the principal centres within each. As can be seen from the table, for the purposes of our updated analysis, we have assumed that the 'northern sub-area' comprises zones 2, 3, 4, 5, 6 and 7 of the NNCA; whilst the 'southern sub-area' comprises zones 8, 9, 10 and 11[1].

Table 1.1 — NNCA survey zones by sub-area

Zone	Zone name	Main population centres	Principal local planning authority	Sub-Area
1	Uppingham	Uppingham	Rutland County	n/a
2	Oundle	Oundle	East Northamptonshire	Northern Sub-Area
3	Rothwell & Desborough	Rothwell, Desborough	Kettering Borough	
4	Corby	Corby	Corby Borough	
5	Kettering (hinterland)	Burton Latimer	Kettering Borough	
6	Kettering (urban area)	Kettering	Kettering Borough	
7	Thrapston	Thrapston	East Northamptonshire	
8	North of Northampton	Earls Barton, Brixworth	Daventry District	Southern Sub-Area
9	Wellingborough	Wellingborough	BC of Wellingborough	
10	Four Towns	Rushden, Raunds, Higham Ferrers, Irthlingborough	East Northamptonshire	
11	South of Wellingborough	Irchester, Woolaston	BC of Wellingborough	

[1] We have renamed from 10 from 'Rushden & Raunds' to 'Four Towns' for the purposes of this update.

1.3 Summary of previous findings

Shopping patterns

1.3.1 For the purposes of this update we do not discuss the findings of the household telephone survey of shopping patterns in detail. No new survey has been undertaken in support of this update, and a summary of the findings of the previous survey is set out at Section 2 of the NNRCU[2].

1.3.2 By way of recap, the survey identified that, across the NNCA as a whole, 61.5% of available comparison goods expenditure is retained within the NNCA: of this, Kettering town centre accounted for 14%, Wellingborough town centre 9%, Corby town centre 8% and Rushden town centre 4%. The remaining expenditure which is retained within the NNCA is spent at retail parks and large out-of-town foodstores, including Phoenix Retail Park in Corby (3%) and Northfield Avenue in Kettering (also 3%).

1.3.3 Of the comparison goods expenditure which 'leaks' outside the NNCA, the most popular destinations for comparison goods shopping are Northampton (15% of total comparison goods spending), followed by Peterborough (6%) and Milton Keynes (5%). The findings of the household survey identified that, relative to the previous household survey (undertaken in support of the Roles & Relationships Study, 2005), both Kettering town centre and Northampton town centre had lost market share, whilst the proportion of residents using out-of-town facilities in Kettering, Corby and Wellingborough increased. This change was particularly apparent in Kettering, where the market share of the town centre decreased by 5.1%, whilst the market share of the retail parks (where a number of new developments had been permitted since 2005), has increased by 4.6%. We note that subsequent to the NNRCU, further permissions for new out-of-centre retail floorspace have been granted in Kettering.

1.3.4 The household survey confirmed that the NNCA is largely self-sufficient in terms of convenience goods shopping, which is generally a more localised activity, with 87% of expenditure retained within the NNCA. The three most popular foodstores for residents in the NNCA (Asda in Corby, Tesco in Kettering and Tesco in Wellingborough) each attract a turnover of over £50m.

Quantitative need — comparison goods

1.3.5 The NNRCU identified the following comparison goods requirements over the period to 2031 (**Table 1.2**), with the 'static' retention requirement assuming that current patterns of comparison goods shopping remain unchanged throughout the study period, and the 'increasing' retention scenario assuming a modest uplift in the retention rate of centres and stores within the NNCA from 61.5% to 65% (which was based on the assumption of new comparison goods-led retail developments in Kettering, Corby and Wellingborough would come forward over the course of the study period).

Table 1.2 — Summary of comparison goods floorspace requirements from NNRCU

	2010-16 (sq.m net)	2016-21 (sq.m net)	2021-26 (sq.m net)	2026-31 (sq.m net)	Total to 2031 (sq.m net)
Static retention (62%)	-19,800	12,100	15,700	17,900	**25,900**
Increasing retention (65% by 2031)	-19,800	15,700	17,800	20,600	**34,300**

Source: NNRCU, Table 4.1. Negative figures to 2016 indicate oversupply. 'Total to 2031' figures include over-supply of floorspace to 2016. Figures rounded to the nearest hundred.

[2] In this update, we adopt the household survey shopping patterns from 2010. We then roll these shopping patterns forward to 2014. Whilst it is appreciated that there have been changes in expenditure between 2010 and 2014, given that this period also included a downturn in the economy, we have simply rebased the survey data to 2014 rather than model any changes to expenditure during this timeframe.

1.3.6 Therefore, the NNRCU identified a requirement of between 25,900 and 34,300 sq.m net comparison goods floorspace, which arose in the period post-2016, on account of the identified short-term oversupply of floorspace which was identified.

1.3.7 The NNRCU also identified a requirement for an additional 8,400 sq.m net convenience goods floorspace for the NNCA over the period to 2031 (**Table 1.3**), and the results of the household survey indicate that many foodstores across the NNCA are 'over-trading' against company averages, which is in itself both a quantitative and qualitative indicator for pent-up demand for new floorspace.

Table 1.3 — Summary of convenience goods floorspace requirements from NNRCU

	2010-16 (sq.m net)	2016-21 (sq.m net)	2021-26 (sq.m net)	2026-31 (sq.m net)	Total to 2031 (sq.m net)
Static retention (87%)	-1,000	2,600	3,300	3,500	**8,400**

Source: NNRCU, Table 4.2. Negative figures to 2016 indicate oversupply. 'Total to 2031' figures include over-supply of floorspace to 2016. Figures rounded to the nearest hundred.

1.3.8 As noted above, the NNRCS also identified a series of qualitative requirements for new retail floorspace which were considered to remain applicable to the updated capacity requirements set out in the NNRCU.

2 Updates to data inputs

2.1 Introduction

2.1.1 In this section we set out the changes to the data inputs which inform our retail capacity update. As with the NNRCU, the changes relate to the following inputs:

- Population forecasts (**Section 2.2)**
- Per capita expenditure data (**Section 2.3**);
- Special Forms of Trading (such as online shopping) **(Section 2.4);**
- Turnover efficiency gain in existing retailers (**Section 2.5**); and
- Retail planning commitments **(Section 2.6)**

2.2 Population forecasts

2.2.1 Our update makes use of 2012-based population projections, bespoke for each of the 11 survey zones which make up the NNCA, provided by Experian. From 2012 onwards, we apply the most recent population projections supplied to us by the JPU), which is termed the 'Variant Migration' model, dated July 2014. These forecasts are provided for each of the individual JPU authorities, and therefore we apply a growth rate derived from these district-wide forecasts to each of the NNCA zones, based on whichever authority is most closely aligned to that survey zone. For East Northamptonshire, we adopt different growth rates for the Rural North, Oundle & Thrapston (RNOT) and Four Towns (FT) parts of the District, in response to the higher level of planned housing development in the latter area.

2.2.2 The growth rates applied are as follows:

- Zone 1 – Sub-National Population Projections for Rutland County
- Zone 2 and Zone 7 – East Northamptonshire (RNOT)
- Zone 3, Zone 5 and Zone 6 – Kettering Borough
- Zone 4 – Corby Borough
- Zone 8 – Sub-National Population Projections for Daventry District
- Zone 9 and Zone 11 – Borough of Wellingborough
- Zone 10 – East Northamptonshire (FT)

2.2.3 A summary of the population growth expected to come forward in each of the survey zones by 2031, at the study base year of 2014, and the interval years of 2014, 2018, 2021 and 2026, is shown at **Table CM1** of **Appendix B.** For ease of reference, we summarise the population growth which we expect to come forward in **Table 2.1**. This shows that the population of the NNCA is expected to increase by 76,434 persons (which is broadly comparable to the level of population growth identified in the NNRCU, albeit this was over a slightly longer timeframe[3])

Table 2.1 – Population forecasts for NNCA to 2031

2014	2018	2021	2026	2031	Change
371,560	375,124	398,177	423,523	447,994	+76,434

Source: Table CM1, Appendix B

[3] The NNRCU identified a population growth of 78,036 persons over the period 2010-31

2.3 Expenditure growth rates

2.3.1 Updated, 2012-based per capita spending on comparison (non-food) and convenience (food) goods is provided by Experian for each of the NNCA zones. In order to calculate how much per capita spending is likely to increase over the course of the study period, we apply expenditure growth rates sourced from Experian's Retail Planner Briefing Note 12 (October 2014) to the base year figures.

2.3.2 At the time of the NNRCU, the most recent published guidance from Experian identified expenditure growth rates of 3% per annum for comparison goods, and 0.6% per annum for convenience goods (0.56% per annum for the period 2016-21). Experian's Retail Planner Briefing Note 12 (October 2014) does not offer a significant departure from the comparison goods figures, identifying a growth rate of 3% per annum between 2016 and 2021, which increases slightly to 3.1% per annum from 2021 to 2031, although one significant change is a more optimistic short-term (to 2016) growth rate in line of the current economic recovery. Experian's forecasts of expenditure growth in the convenience goods sector are broadly unchanged from those used in the NNRCU, with a growth rate of 0.6% per annum applied for the period 2017-31.

2.3.3 Full details of the growth rates applied to the base year per capita expenditure figures are set out in **Table CM2** (for comparison goods) and **Table CV2** (for convenience goods) of **Appendix B.**

2.4 Special Forms of Trading

2.4.1 'Special Forms of Trading' (SFT) is expenditure which is diverted from traditional retail outlets towards channels such as online shopping. SFT therefore acts as a 'claim' on expenditure which is available to support physical retail outlets, and therefore is removed from the total expenditure 'pot' in order to ensure that the residual expenditure (i.e. that which is left over having removed the SFT) is available to entirely support physical retail developments.

2.4.2 Experian Retail Planner Briefing Note 12 provides the most recent published guidance on SFT forecasts. As in the NNRCU, we adopt Experian's 'adjusted' SFT rates for the purposes of our assessment, which make allowance for 'store-picked' online transactions (whereby the customer orders a product online, but it is processed by the nearest local branch of the retailer). **Table 2.2** shows the SFT forecasts set out in Experian Retail Planner 12, alongside those used in the NNRCU. It can be seen that there has been an increase in the 'claim' of SFT on comparison goods spending relative to that identified previously, but the convenience goods 'claim' has actually reduced slightly relative to that previously adopted.

Table 2.2 — Special Forms of Trading

	Comparison goods			Convenience goods		
	SFT discount (this study)	SFT discount (NNRCU)	Difference	SFT discount (this study)	SFT discount (NNRCU)	Difference
2014	11.7%	-	-	2.6%	-	-
2016	-	12.7%	-	-	5.9%	-
2018	14.7%	-	-	3.6%	-	-
2021	15.9%	12.4%	+3.5%	4.4%	6.3%	-1.9%
2026	15.9%	12.1%	+3.8%	5.0%	6.8%	-1.8%
2031	15.5%	12.0%	+3.5%	5.6%	7.0%	-1.4%

Source: Experian Retail Planner Briefing Note 12, Appendix 3 / NNRCU

2.5 Sales density growth in existing retailers

2.5.1 It is also necessary to make allowance for sales density growth (also known as floorspace productivity growth) in existing comparison and convenience goods retailers. This is based on the assumption that existing stores within the NNCA will trade at increasingly efficient levels of turnover per sq.m over the course of the study period. Allowances for sales density growth are linked to expenditure growth and therefore there are a number of changes to sales density figures relative to those used in the NNRCU; **Table 2.3** summarises the sales density growth rates we have used for the purposes of our assessment.

2.5.2 Owing to the low forecasts of expenditure growth in the convenience goods sector, we do not forecast any sales density growth in this sector until 2016 onwards.

Table 2.3 — Sales density growth rates

	Comparison goods		Convenience goods	
	Sales density growth allowance (this study) (% per annum)	Sales density growth allowance (NNRCU) (% per annum)	Sales density growth allowance (this study) (% per annum)	Sales density growth allowance (NNRCU) (% per annum)
To 2016	1.7%	0.75%	0%	0.06%
2016 onwards	1.7%	1.66% (to 2021) / 1.75% (2021-31)	0.3%	0.29% (to 2021) / 0.25% (2021-31)

Source: PBA estimates

2.6 Commitments to new retail floorspace

2.6.1 The household survey data which our capacity assessment is based on dates from the NNRCS in 2011. In order to provide an accurate indication of the amount of surplus comparison and convenience goods expenditure which is available to support new floorspace, it is necessary to deduct the turnovers of retail developments which have been granted permission subsequent to this point. Such commitments can include developments which have commenced trading subsequent to completion of the household survey, or sites that benefit from an extant planning permission that has not been implemented.

2.6.2 The NNRCS made allowance for a number of committed comparison and convenience goods developments, which were carried forward into the NNRCU. In conjunction with the JPU we have reviewed these commitments, in order to establish whether they need to be carried forward again, or removed from the capacity forecasts (for example, if the planning permission has lapsed).

Comparison goods commitments

2.6.3 For comparison goods commitments, we set out this exercise in **Table CM6a** and **Table CM6b** of **Appendix B**, with Table CM6a showing the 'carried over' commitments (the turnover of which we have updated to assume that all developments will commence trading by 2018), and Table CM6b showing new commitments which have been included for this update.

Existing commitments

Table CM6a of Appendix B shows that there is a total of £52.17m of comparison goods commitments at 2014 which have been 'carried over' from the NNRCU. We forecast the turnover of these commitments will increase to £54.36m by 2018 (split between £50.82m for the Northern sub-area, and £1.35m for the Southern sub-area). The largest single commitment is the comparison goods

floorspace within the Tesco Extra store at Corby (£28.88m at 2018), which commenced trading subsequent to completion of the NNRCS and is therefore not accounted for in the household survey results.

New commitments

2.6.4 **Table CM6b** of Appendix B lists the 'new' commitments we have included in our assessment. As identified previously, the most significant of these additional commitments is Rushden Lakes, which for the purposes of our assessment we have assumed all of the permitted retail floorspace will all be used for the sale of comparison goods. The Inspector's Report into the Rushden Lakes decision considered that this development is likely to achieve a turnover in the region of £99.6m from the NNCA. This represents the turnover figure identified by White Young Green (WYG) in their proof of evidence on behalf of East Northamptonshire Council (ENC)[4]. WYG's impact assessment set out patterns of trade draw to Rushden Lakes from each of the NNCA zones, which can be summarised as follows:

- Turnover from the northern sub-area: £12.45m in 2018;
- Turnover from the southern sub-area: £87.18m in 2018.

2.6.5 In the Northern Sub-Area, we are aware of a number of further 'new' commitments:

- Sub-division of former Wickes store, Kettering (assumed turnover of £6.10m at 2018);
- Former Comet, Kettering (Section 73 application) (£2.72m);
- Pets at Home, Corby (mezzanine floor) (£0.62m);
- Waitrose, Oundle (comparison goods floorspace) (£1.50m); and
- Sainsbury's, Thrapston (comparison goods floorspace) (£1.35m);

2.6.6 Therefore, when also including the expected turnover of Rushden Lakes, the total 'new' comparison goods planning commitments in the Northern Sub-Area amount to £24.74m.

2.6.7 In the Southern Sub-Area, we are also aware of a number of additional 'new' commitments:

- Retail floorspace at Wellingborough North urban extension (£3.22m at 2018);
- Retail floorspace at Wellingborough East urban extension (£1.05m at 2018);
- Former Knapp site, Wellingborough (£4.17m); and
- Country Goods store, Irthlingborough (£1.42m)

2.6.8 Therefore, when also including the expected turnover of Rushden Lakes, the total 'new' comparison goods planning commitments in the Southern Sub-Area amount to £97.05m.

Total comparison goods commitments

2.6.9 **Table CM6c** of **Appendix B** provides a summary of the total comparison goods retail commitments, summing those 'carried over' (as shown in **Table CM6a**) and the 'new' commitments (**Table CM6b**). It shows that in total, extant permissions account for the following 'claims' on comparison goods expenditure at 2018:

- Northern Sub-Area: £79.10m
- Southern Sub-Area: £98.50m

[4] PBA have not been asked to endorse or otherwise comment on these assumptions, notwithstanding that they have an impact on the outcome of the capacity modelling. It is however important to note that there is considerable uncertainty over the likely trading performance of Rushden Lakes, and for this reason we recommend that a refresh of the JPU's retail evidence base is undertaken once Rushden Lakes is open and trading patterns have been established.

- Overall total for NNCA: £177.60m

Convenience goods commitments

2.6.10 In **Table CV6a and CV6b** of **Appendix B**, we repeat the above exercise for convenience goods floorspace.

Existing commitments

2.6.11 **Table CV6a** shows that convenience goods commitments with a combined turnover of £91.11m at 2014 (split between £75.79m for the Northern Sub-Area and £15.32m for the Southern Sub-Area). The turnover of these commitments is expected to increase to £121.54m by 2018 (£106.13m for the Northern Sub-Area, the increase being accounted for by planned supermarket developments to serve sustainable urban extensions to Corby, and £15.41m for the Southern Sub-Area). Again, the majority of the existing committed floorspace is accounted for by the Tesco Extra store in Corby which is now trading (estimated convenience goods turnover of £67.91m in 2018).

New commitments

2.6.12 **Table CV6b** lists the convenience goods developments which have been granted planning permission subsequent to the NNRCU. In the Northern Sub-Area, these include three new supermarket developments in East Northamptonshire: Waitrose in Oundle, which is now trading (estimated convenience goods turnover at 2018 of £12.27m; Sainsbury's in Thrapston, which benefits from permission but remains undeveloped (estimated convenience goods turnover at 2018 of £23.91m); and a small Co-Operative foodstore in Kettering. In the Southern Sub-Area, commitments include a proposed foodstore at new district, neighbourhood and local centres at Wellingborough North and Wellingborough East (estimated combined convenience goods turnover at 2018 £16.42m), a discount foodstore as part of the redevelopment of the former Knapp site in Wellingborough (estimated convenience goods turnover at 2018 £7.44m), and a foodstore at the former Express Works site in Irthlingborough (estimated convenience goods turnover at 2018 of £15.08m).

2.6.13 When combined, the new commitments in the Northern Sub-Area total £38.54m at 2018, and new commitments in the Southern Sub-Area total £41.81m at 2018.

Total convenience goods commitments

2.6.14 **Table CV6c** of **Appendix B** provides a summary of the total convenience goods retail commitments, summing those 'carried over' (as shown in **Table CV6a**) and the 'new' commitments (**Table CM6b**). It shows that in total, extant permissions account for the following 'claims' on convenience goods expenditure at 2018:

- Northern Sub-Area: £144.67m;
- Southern Sub-Area: £57.22m;
- Overall total: £201.89m

2.6.15 Having made allowance for these changes to the inputs to the capacity forecasts, in the following section we set our updated comparison and convenience goods capacity forecasts.

3 Updated comparison goods capacity forecasts

3.1 Introduction

3.1.1 In the previous section we have set out the key changes to the data inputs which inform our updates to the comparison and convenience goods capacity forecasts for the NNCA. We set out our revised comparison goods forecasts in this section, and the revised convenience goods forecasts in **Section 4**. As discussed previously, reflecting the emerging revised spatial strategy for North Northamptonshire, we split the capacity forecasts between the Northern Sub-Area and the Southern Sub-Area, as well as presenting an overall capacity for the NNCA.

3.1.2 The findings of this section should be read in conjunction with the following appendices:

- **Appendix B**, which sets out our updated quantitative need tabulations;
- **Appendix C**, which sets out a summary of the methodology for calculating retail need; and
- **Appendix D**, which sets out a summary of the key data inputs into our quantitative assessment (many of which we have discussed in the previous section).

3.2 Structure of quantitative assessment

3.2.1 The data tables set out at Appendix B follow a standard format, organised as shown in **Table 3.1.**

Table 3.1 — Structure of quantitative assessment, Appendix B

Table	Description
Table CM1	Summarises the updated population projections in the 11 NNCA zones, at the study base year of 2014, and the interval years of 2018, 2021, 2026 and 2031.
Table CM2	Shows the per capita expenditure on comparison goods for the 11 zones, at the base and interval years.
Table CM3	Sets out updated estimates of total comparison goods spending for the NNCA, by multiplying the population figures in Table CM1 with the per capita expenditure figures in Table CM2. A discount is applied at each interval period for 'Special Forms of Trading' such as online shopping, as discussed in the previous section.
Table CM4	Shows the current market shares (in percentage terms) for comparison goods shopping destinations in the NNCA. These are unchanged from those in the NNRCU, and previously the NNRCS, as no new household survey has been undertaken in support of this update.
Table CM5	Applies the percentage market shares from Table CM4 to the total available comparison goods expenditure shown in Table CM3, to show the spending patterns to each comparison goods shopping destination in monetary terms.
Table CM6	Sets out a summary of the comparison goods retail planning commitments which act as a 'claim' on the total available comparison goods expenditure. As discussed in the previous section, we have split these commitments between the Northern Sub-Area and Southern Sub-Area, and also between 'carried over' commitments from the NNRCU, and 'new' commitments, for which planning permission has been granted subsequent to completion of the NNRCU. At the foot of Table CM6 we also list the commitments which were included within the NNRCU which have now been removed from our capacity forecasts because they are unlikely to proceed in the form originally envisaged.

Table	Description
Table CM7	Sets out the revised comparison goods retail capacity forecasts for the NNCA, split between the Northern Sub-Area (Table CM7a and Table CM7b) and Southern Sub-Area (Table CM7c and Table CM7d). For both the Northern Sub-Area and Southern Sub-Area, we set out a 'constant market share' capacity forecast (which assumes current patterns of shopping will remain unchanged over the study period) and an 'increasing market share' forecast. The latter assumes that, for the Northern Sub-Area, there will be improvements to the comparison goods offer in Corby and Kettering town centres, which will in turn allow for an improved rate of expenditure retention. We have modelled these improvements to come forward by 2021, reflecting the approach adopted in the NNRCU. Any increasing retention scenario for the Northern Sub-Area will require the delivery of comparison goods scheme for each town centre which offers sufficient quality so as to be able to effectively compete with Rushden Lakes and other competing centres outside the NNCA. For the Southern Sub-Area, we also model an 'increased retention' scenario, which assumes that the development of Rushden Lakes will result in reduced expenditure leakage to destinations outside the NNCA, such as Northampton and Milton Keynes, reflecting the findings of the Rushden Lakes decision, which concluded that the development of Rushden Lakes will allow a greater level of trade retention in the Southern area. We have calculated the increasing retention rate by assuming the retention rate in zone 10 will increase to 67%, from its current rate of 37.5%. This reflects the assumption used in the Rushden Lakes planning application. We have also made allowance for a reduction in the expenditure rate of zone 9, as it is expected the turnover of Wellingborough town centre will decrease as a consequence of the opening of Rushden Lakes. When this is taken into account, the aggregate retention rate for the Southern Sub-Area increases to 57.7%.

Source: Appendix B

3.3 Summary of comparison goods floorspace requirements

3.3.1 The revised capacity forecasts are therefore summarised in **Table CM7a and Table CM7b** of **Appendix B** for the Northern Sub-Area, and **Table CM7c and Table CM7d** of Appendix B for the Southern Sub-Area**.** Each of these tables is structured as follows:

- **Row A** summarises the population of the NNCA at 2014 (the study base year), 2018, 2021, 2026 and 2031 (derived from Table CM1);
- **Row B** summarises the total comparison goods expenditure available to the NNCA at the same interval years (derived from Table CM3);
- **Row C** summarises the total comparison goods expenditure available to the relevant Sub-Area (also derived from Table CM3);
- **Row D** shows the amount of comparison goods expenditure retained by the Sub-Areas, as a proportion of the total expenditure available to the NNCA, and based on the patterns of spending identified in the household survey in support of the NNRCS; **Row E** shows the expenditure leakage (Row B minus Row D);
- **Rows F, G and H** repeat the exercise above, but show the figures for the relevant Sub-Area rather than the NNCA as a whole. Therefore for example, Row F of Table CM7a shows that of the total comparison goods expenditure available to residents of the Northern Sub-Area (as shown in Row C), 63.7% is spent at stores/centres in the Northern Sub-Area, equivalent to £335.78m at 2014. The expenditure leakage from the Northern Sub-Area is shown in Row H.

- **Rows I and J** show the amount of 'inflow' of comparison goods expenditure we have allowed for in the capacity assessment. The figures in Tables CM7a and CM7b show 'inflow' of expenditure from residents in the Southern Sub-Area to destinations within the Northern Sub-Area (e.g. residents in Wellingborough who visit Kettering for shopping), and vice-versa for Tables CM7c and CM7d. Inflow, as a proportion of total expenditure, remains constant. We have not allowed for any inflow from outside the wider NNCA — this approach is consistent with our previous studies. Whilst the development of Rushden Lakes will result in expenditure inflow from outside the NNCA, we have not made allowance for this as Rushden Lakes will not be a defined town centre within the JPU's hierarchy of centres in North Northamptonshire.

- **Row K** shows the total comparison goods turnover of the centres in the respective Sub-Areas. These figures are held static throughout the study period; the growth in available comparison goods expenditure is shown in Row L;

- **Rows M, N and O** summarise the 'claims' on expenditure growth which must be deducted from the total available expenditure shown in Row K. Row M makes allowance for growth in sales efficiency of existing retailers; Row N summarises the turnover of the comparison goods retail commitments as discussed in **Section 2**; and Row O sums Rows M and N together to show the total 'claims' on expenditure.

- **Rows P, Q and R** draw together the preceding information to present a summary of comparison goods expenditure capacity for each Sub-Area. Row P summarises the total available expenditure to the Sub-Area (reflecting the figures in Row L); Row Q summarises the 'claims' on comparison goods expenditure (reflecting the figures in Row O), and Row R shows the residual amount of comparison goods expenditure which is available to support new floorspace.

- Finally, **Rows S, T and U** convert the surplus expenditure in monetary terms (in Row R) to floorspace, by applying the sales densities shown in Row P to the expenditure from Row O. Row P shows that we have adopted a sales density of £5,000 per sq.m at the study base year (2014), and we have increased this over the study period in line with the sales density growth rate of 1.5% per annum, as previously discussed. Row T shows the resultant floorspace requirements in net sales area, and Row U in gross area (using a 70% gross: net ratio).

3.3.2 For ease of reference, we summarise the comparison goods floorspace requirements from Tables CM7a to CM7d of Appendix B in **Table 3.2** (figures are rounded from those in Appendix B):

Table 3.2 — Summary of comparison goods floorspace requirements by Sub-Area

	2014 (sq.m net)	2018 (sq.m net)	2021 (sq.m net)	*2026* (sq.m net)	*2031* (sq.m net)
Northern Sub-Area					
Static Retention	-12,000	-7,700	-2,600	*10,200*	*24,900*
Increasing Retention (2021+)	-12,000	-7,700	4,700	*19,400*	*36,400*
Southern Sub-Area					
Static Retention	-1,300	-14,400	-11,500	*-4,200*	*4,100*
Increasing Retention (2018+)	-1,300	-6,200	-3,300	*4,500*	*13,400*

Source: Table CM7a, Table CM7b, Table CM7c, Table CM7d, Appendix B. Negative figures denote over-supply. Figures in italics are indicative.

3.3.3 Therefore, based on the assumptions set out in Section 2 of this report, the floorspace requirements we identify are as follows:

- **Between 24,900 and 36,400 sq.m net** comparison goods floorspace in the Northern Sub-Area, but not until the latter part of the study period (2021 to 2031, or 2026 to 2031 under the static retention scenario), and with the upper-end forecast dependent on comparison goods schemes of sufficient quality so as to deliver an improvement to the expenditure retention rate being delivered in the town centres of Kettering and Corby; and

- **Up to 13,400 sq.m net** comparison goods floorspace in the Southern Sub-Area, again arising at the end of the study period at 2026/2031, and based on the assumption that the delivery of Rushden Lakes will trade in line with the turnover of the scheme as forecast by WYG[5], and will lead to an uplift in comparison goods expenditure retention for the Southern Sub-Areas as a whole

3.3.4 We repeat the advice set out in the NNRCU that forecasts beyond 2021 should be considered indicative, and should be subject to regular review through the Council's Core Strategy period.

[5] See paragraph 2.6.4 and footnote on page 8 of this report

4 Updated convenience goods capacity forecasts

4.1.1 In this section we set out our updated assessment of convenience goods capacity for the NNCA, which should be read alongside **Tables CV1 to CV7a and CV7b** of **Appendix B.** The structure of these tables are the same as the comparison goods assessment in the previous chapter, and therefore we do not repeat our approach here. As with the comparison goods assessment, we provide separate forecasts for the Northern Sub-Area and Southern Sub-Area.

4.1.2 The household survey undertaken in support of the NNRCS identified considerable over-trading of many of the existing network of foodstores across the NNCA, when compared to operator 'benchmark' turnovers (i.e. if they were trading in line with their company averages). As no new household survey has been undertaken in support of this Update, we continue to apply this over-trading to the updated capacity forecasts. **Row O** of **Table CV7a** shows that, on aggregate, foodstores in the Northern Sub-Area are over-trading by £87.47m, **Row O** of **Table CV7b** shows that foodstores in the Southern Sub-Area are over-trading by £56.52m, and therefore these amounts are included in our capacity calculations.

4.1.3 It should also be noted that convenience goods floorspace trades at a higher sales density (turnover per sq.m) than comparison goods floorspace, and this is reflected in the sales density figures shown at Row Q of Table CV7a/7b, which is £12,500 per sq.m at the base year of 2014. The sales density figure is increased in line with the sales efficiency growth rates shown in **Table 2.3**.

4.1.4 Our convenience goods capacity assessment only assumes a 'constant market share' approach, i.e. that current levels of convenience goods expenditure retention will remain unchanged over the remainder of the study period. This is considered a robust approach to take given that the household survey in support of the NNRCS identified good levels of expenditure retention (87%) across the NNCA as a whole, and each of the major centres in the NNCA is served by a number of foodstores. Furthermore, we are not aware of any major foodstore developments in centres surrounding the NNCA which are likely to fundamentally alter this retention rate.

4.1.5 **Table 4.1** summarises the requirement for additional convenience goods floorspace in the NNCA (figures are rounded from those shown in Table CV7 of Appendix B):

Table 4.1 — Summary of convenience goods floorspace requirements

	2014 (sq.m net)	2018 (sq.m net)	2021 (sq.m net)	2026 (sq.m net)	2031 (sq.m net)
Northern Sub-Area (sq.m net)	-200	-3,800	-2,900	*-900*	*1,000*
Southern Sub-Area (sq.m net)*	1,300	400	1,100	*2,700*	*4,100*

Source: Table CV7a, Table CV7b, Appendix B. Figures *in italics* are indicative. *Note: requirements decrease from 2014 to 2018 as a number of commitments for new retail floorspace are not expected to commence trading until 2018.

4.1.6 Therefore, the JPU should seek to plan for up to 1,000 sq.m net additional convenience goods floorspace for the Northern Sub-Area over the study period (although this requirement only arises at the end of the Plan period, and based on current trading patterns, there is an over-supply of floorspace in the Northern Sub-Area until 2026), and up to 4,100 sq.m net additional convenience goods floorspace for the Southern Sub-Area, including up to 1,100 sq.m net by 2021. As with the comparison goods forecasts, it is advised that figures beyond 2021 are considered indicative and subject to regular updating.

4.1.7 Whilst it is not within the remit of this Update to provide a full update to the qualitative retail needs of the NNCA, we note that Tesco have recently confirmed they will not be proceeding with the redevelopment of the Lawrence's Factory site in Desborough town centre. It is considered that the provision of a medium-sized supermarket in the Rothwell / Desborough area should be a priority for the early part of the Plan period, notwithstanding the absence of quantitative need for the Northern Sub-Area in the early part of the Plan period. Elsewhere, we would expect additional provision to be directed towards meeting the needs of the new residential communities across the JPU area, although some of these are already accounted for via existing permissions (see Table CV6, Appendix B).

5 Conclusions and recommendations

5.1.1 This report sets out updated assessments of quantitative retail capacity for North Northamptonshire, and serves as a refresh of the capacity forecasts set out in the North Northamptonshire Retail Capacity Update (NNRCU), which was completed in 2012. It updates estimates of population growth, per capita expenditure growth, 'special forms of trading' such as online shopping, and commitments for new retail development. We also have regard to the Secretary of State's decision to allow the development of a significant quantum of new comparison goods retail floorspace at Rushden Lakes in East Northamptonshire.

5.1.2 Reflecting the proposed changes to the spatial planning for development in North Northamptonshire, in this update we have split the capacity figures between the 'Northern Sub-Area' (which includes Kettering, Corby, and the 'Rural North, Oundle & Thrapston' part of East Northamptonshire) and the 'Southern Sub-Area' (which includes Wellingborough and the 'Four Towns' part of East Northamptonshire).

Comparison goods capacity forecasts

5.1.3 There has been a decrease in the overall quantitative requirements for additional comparison goods floorspace compared to the forecasts set out in the NNRCU; this is an expected outcome due to the Rushden Lakes commitment, and the increasing claim on expenditure for 'special forms of trading'. However, this does not mean that there is no scope for further growth, particularly in the Northern Sub-Area. Based on current patterns of shopping ('constant market share'), there will be a requirement for up to 24,900 sq.m net additional comparison goods floorspace in the Northern Sub-Area, but this need does not arise until the end of the study period (i.e. post-2021).

5.1.4 It will be challenging for the Northern Sub-Area to retain its current market share, due to the likely strong comparison goods offer at Rushden Lakes, which can be expected to draw trade from the Northern Sub-Area. In reality, we consider this figure of24,900 sq.m net forms a suitable 'upper limit' for the amount of floorspace will could realistically come forward. Although this requirement does not arise until the latter stages of the study period, should suitable sites be available, there is no policy reason why the requirement could not be brought forward (provided it was on a town centre site). However, this conclusion needs to be considered alongside wider constraints, such as site availability, market demand, and so on.

5.1.5 Irrespective of our provision above, the JPU have asked for us to test the capacity requirements which arise from testing an increasing market share in the Northern Sub-Area, to 5 percentage points above the current level of expenditure retention. We consider it will be challenging for the Northern Sub-Area to permanently increase its retention rate over and above its current position given the extent of competition. Any uplift will be dependent on the delivery of modern, well-located comparison goods floorspace, with a strong tenant mix, in both Kettering and Corby town centres. The extent to which the retention rate will be increased will ultimately lie with the scale of floorspace and tenant mix which can be attracted, and the extent to which it will enable Kettering and Corby town centres to offer a genuine alternative to the (likely strong) offer of Rushden Lakes. Should such a scenario be achievable, the capacity requirement increases to 36,400 sq.m net by 2031, again with the majority of this requirement arising post-2026.

5.1.6 In the Southern Sub-Area, the Rushden Lakes commitment means that under the constant market share scenario, there is no requirement for additional comparison goods retail floorspace for the majority of the study period, with a small requirement of 4,100 sq.m net arising at the very end of the study period. Prior to this point, any surplus expenditure capacity is absorbed by Rushden Lakes and the other extant planning commitments. However, because Rushden Lakes can be expected to result in a reduction in the amount of expenditure 'leakage' from the study area, we have also tested an

'increasing retention' scenario, which allows for a greater amount of comparison goods spending to be retained in the Sub-Area (reflecting the wider ambitions of the JPU to improve the sustainability of shopping patterns in the Southern Sub-Area). Under this scenario, at the end of the Study period (2026-31), we have identified a requirement for an additional 13,400 sq.m net comparison goods floorspace, which is generated on the basis that expenditure retention will increase in line with the applicants' forecasts (also allowing for a reduced turnover of retail locations in the Wellingborough area), and that the scheme will achieve a turnover in line of that forecast by WYG. As such, this figure should be treated as indicative. It will be important for the JPU to monitor the trading performance of Rushden Lakes and undertake a full refresh of its retail evidence base (including a new household telephone survey of shopping patterns), once the development has commenced trading and trading patterns have 'bedded down' (we recommend two years after the opening of the scheme).

Convenience goods capacity forecasts

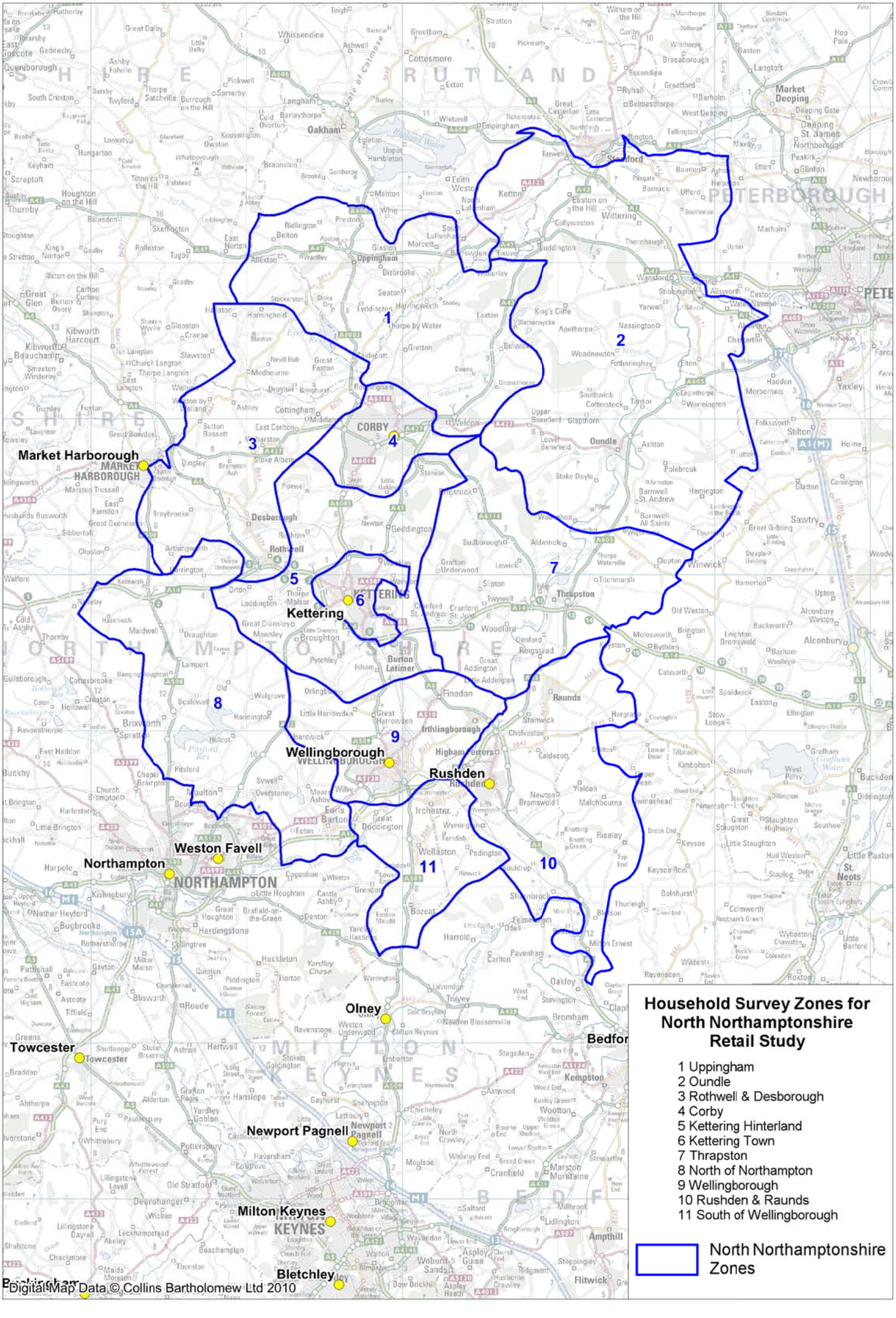
5.1.7 We have also provided an update to the quantitative requirements for additional convenience goods floorspace, which again has been disaggregated between the Northern Sub-Area and the Southern Sub-Area. There is no immediate quantitative need for any additional convenience goods floorspace in the Northern Sub-Area, however there is a qualitative requirement for provision of a medium-sized foodstore (in the region of 2,000 sq.m net) to serve the Rothwell / Desborough area.

5.1.8 In the Southern Sub-Area some of the short-term quantitative need will be met by planned new convenience goods developments in Wellingborough, but there remains a requirement for an additional 1,100 sq.m net convenience goods floorspace by 2021, increasing to 4,100 sq.m net by 2031. Much of this requirement is generated by the strong trading performance of existing foodstores, which are 'over-trading' relative to company average levels.

Monitoring

5.1.9 As advised previously, it is recommended that capacity forecasts are subject to regular updates throughout the study period, and particularly given the significant recent and planned developments, it will be to refresh surveys of shopping patterns at regular intervals.

Appendix A Study Area Map


Household Survey Zones for North Northamptonshire Retail Study
1 Uppingham
2 Oundle
3 Rothwell & Desborough
4 Corby
5 Kettering Hinterland
6 Kettering Town
7 Thrapston
8 North of Northampton
9 Wellingborough
10 Rushden & Raunds
11 South of Wellingborough
North Northamptonshire Zones
Market Harborough
Kettering
Wellingborough
Rushden
Weston Favell
Northampton
Olney
Towcester
Newport Pagnell
Milton Keynes
Bletchley
Digital Map Data © Collins Bartholomew Ltd 2010

Appendix B Quantitative Capacity Forecasts

Table CM1 —
Population projections

	2012	2014	2018	2021	2026	2031	Change, 2014-31
Zone 1	11,085	11,318	11,938	12,387	13,082	13,644	2,326
Zone 2	23,852	24,094	24,633	25,248	26,464	27,565	3,471
Zone 3	28,485	28,950	29,896	30,766	32,393	34,003	5,052
Zone 4	57,264	59,700	64,978	69,542	78,235	86,756	27,056
Zone 5	25,592	26,010	26,860	27,642	29,103	30,549	4,539
Zone 6	49,785	50,599	52,251	53,772	56,615	59,428	8,830
Zone 7	14,767	14,917	15,250	15,631	16,384	17,065	2,149
Zone 8	23,255	23,648	24,449	25,053	26,091	27,050	3,402
Zone 9	64,550	64,819	65,917	67,478	71,037	74,619	9,800
Zone 10	55,261	55,821	57,070	58,494	61,313	63,862	8,042
Zone 11	11,637	11,685	11,883	12,165	12,806	13,452	1,767
Total	**365,533**	**371,560**	**385,124**	**398,177**	**423,523**	**447,994**	**76,434**

Notes
Base year (2012) populations are sourced from Experian MMG3, bespoke for study area zones.
Population projections for zones 1, 8 and 11 are sourced from Experian MMG3, based on ONS Sub-National population projections.
Population projections for all other zones are dervied from district-level population projections provided by the NNJPU, which take into account planned levels of housing growth. The following district-wide growth rates have been applied:

— Zones 2, 7 - Growth rates for East Northamptonshire: Rural North, Oundle and Thrapston
— Zones 3, 5 and 6 - Growth rates for Kettering Borough
— Zone 9 - Growth rates for Borough of Wellingborough
— Zone 10 - Growth rates for East Northamptonshire: Four Towns

Table CM2 —
Per capita comparison goods expenditure

	2012	2014	2018	2021	2026	2031
	£	£	£	£	£	£
Zone 1	2,956	3,172	3,718	4,074	4,792	5,637
Zone 2	3,278	3,517	4,122	4,517	5,314	6,250
Zone 3	3,069	3,294	3,860	4,230	4,975	5,852
Zone 4	2,160	2,318	2,716	2,977	3,502	4,119
Zone 5	3,212	3,447	4,040	4,427	5,207	6,125
Zone 6	2,475	2,656	3,112	3,411	4,012	4,719
Zone 7	3,392	3,640	4,266	4,675	5,499	6,468
Zone 8	3,264	3,503	4,105	4,498	5,291	6,224
Zone 9	2,502	2,685	3,146	3,448	4,056	4,771
Zone 10	2,975	3,193	3,742	4,101	4,823	5,674
Zone 11	3,147	3,377	3,958	4,337	5,102	6,001

Notes
The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 12, October 2014, Figures 1a and 1b):

2012-13:	2.60%	
2013-14:	4.60%	
2014-15:	5.60%	
2015-16:	4.40%	
2016-17:	3.10%	
2017-21:	3.10%	(per annum)
2021-31:	3.30%	(per annum)

Source: Experian MMG3 (2012 data in 2012 prices).
All monetary values held constant at 2012 prices.

Table CM3 —
Total comparison goods expenditure

a. Total expenditure (Table CM1 x Table CM2)

	2014	2018	2021	2026	2031
	£m	£m	£m	£m	£m
Zone 1	35.90	44.38	50.47	62.69	76.91
Zone 2	84.75	101.53	114.05	140.62	172.28
Zone 3	95.35	115.39	130.14	161.17	199.00
Zone 4	138.38	176.50	207.02	273.94	357.33
Zone 5	89.66	108.50	122.37	151.55	187.12
Zone 6	134.39	162.63	183.41	227.15	280.46
Zone 7	54.30	65.06	73.08	90.10	110.39
Zone 8	82.83	100.35	112.69	138.05	168.35
Zone 9	174.04	207.40	232.68	288.13	356.00
Zone 10	178.23	213.54	239.86	295.73	362.32
Zone 11	39.47	47.03	52.76	65.34	80.73
Total	**1,107.30**	**1,342.32**	**1,518.54**	**1,894.47**	**2,350.89**
Northern Sub-Area total (zones 2 to 7 inclusive)	**596.83**	**729.62**	**830.07**	**1,044.53**	**1,306.57**
Southern Sub-Area total (zones 8 to 11 inclusive)	**474.56**	**568.33**	**638.00**	**787.25**	**967.41**

b. Spending on Special Forms of Trading, e.g. internet shopping

	2014	2018	2021	2026	2031
SFT rate	11.70%	14.70%	15.90%	15.90%	15.50%
	£m	£m	£m	£m	£m
Zone 1	4.20	6.52	8.02	9.97	11.92
Zone 2	9.92	14.93	18.13	22.36	26.70
Zone 3	11.16	16.96	20.69	25.63	30.84
Zone 4	16.19	25.95	32.92	43.56	55.39
Zone 5	10.49	15.95	19.46	24.10	29.00
Zone 6	15.72	23.91	29.16	36.12	43.47
Zone 7	6.35	9.56	11.62	14.33	17.11
Zone 8	9.69	14.75	17.92	21.95	26.09
Zone 9	20.36	30.49	37.00	45.81	55.18
Zone 10	20.85	31.39	38.14	47.02	56.16
Zone 11	4.62	6.91	8.39	10.39	12.51
Total	**129.55**	**197.32**	**241.45**	**301.22**	**364.39**
Northern Sub-Area total (zones 2 to 7 inclusive)	**69.83**	**107.25**	**131.98**	**166.08**	**202.52**
Southern Sub-Area total (zones 8 to 11 inclusive)	**55.52**	**83.54**	**101.44**	**125.17**	**149.95**

c. Residual comparison goods expenditure (Table a less Table b)

	2014	2018	2021	2026	2031
	£m	£m	£m	£m	£m
Zone 1	31.70	37.86	42.44	52.72	64.99
Zone 2	74.83	86.61	95.92	118.26	145.58
Zone 3	84.20	98.43	109.45	135.54	168.15
Zone 4	122.19	150.56	174.10	230.39	301.94
Zone 5	79.17	92.55	102.91	127.45	158.11
Zone 6	118.66	138.72	154.25	191.03	236.99
Zone 7	47.95	55.49	61.46	75.77	93.28
Zone 8	73.14	85.60	94.78	116.10	142.26
Zone 9	153.68	176.92	195.68	242.32	300.82
Zone 10	157.38	182.15	201.72	248.71	306.16
Zone 11	34.85	40.12	44.37	54.95	68.22
Total	**977.74**	**1,145.00**	**1,277.09**	**1,593.25**	**1,986.50**
Northern Sub-Area total (zones 2 to 7 inclusive)	**527.00**	**622.36**	**698.09**	**878.45**	**1,104.05**
Southern Sub-Area total (zones 8 to 11 inclusive)	**419.04**	**484.78**	**536.56**	**662.08**	**817.46**

Notes
Source: Table CM1, Table CM2
Special forms of trading ('SFT') discount source: Experian Retail Planner Briefing Note 12, October 2014, Appendix 3 ('adjusted' percentage figures to take into account store-picked goods)

The main component of SFT is online shopping.

All monetary values are held constant at 2012 prices.

Table CM4 —
Comparison goods market shares (2010-based)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
	%	%	%	%	%	%	%	%	%	%	%
Survey Zone 1											
Uppingham	8.09	0.42	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sub-total for Survey Zone 1	**8.09**	**0.42**	**0.09**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
Survey Zone 2											
Oundle	0.00	7.12	0.00	0.00	0.43	0.00	0.00	0.00	0.08	0.00	0.00
Sub-total for Survey Zone 2	**0.00**	**7.12**	**0.00**	**0.00**	**0.43**	**0.00**	**0.00**	**0.00**	**0.08**	**0.00**	**0.00**
Survey Zone 3											
All centres in Survey Zone 3	0.00	0.00	4.40	0.11	0.20	0.00	0.00	0.28	0.00	0.00	0.00
Sub-total for Survey Zone 3	**0.00**	**0.00**	**4.40**	**0.11**	**0.20**	**0.00**	**0.00**	**0.28**	**0.00**	**0.00**	**0.00**
Survey Zone 4											
Corby town centre	22.21	5.71	3.82	42.01	2.33	3.54	4.67	0.20	0.21	0.21	0.00
Phoenix Retail Park, Corby	8.72	1.99	4.93	12.52	1.76	3.08	5.39	0.00	0.00	0.53	0.00
Asda, Phoenix Parkway, Corby	8.86	3.35	2.88	9.56	0.84	2.38	2.62	0.26	0.00	0.00	0.00
Other destinations, Corby	0.00	0.00	0.09	0.77	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sub-total for Survey Zone 4	**39.80**	**11.05**	**11.71**	**64.86**	**4.93**	**8.99**	**12.68**	**0.46**	**0.21**	**0.74**	**0.00**
Survey Zone 5											
Burton Latimer	0.00	0.00	0.00	0.00	2.30	0.38	0.00	0.00	0.15	0.00	0.00
Sub-total for Survey Zone 5	**0.00**	**0.00**	**0.00**	**0.00**	**2.30**	**0.38**	**0.00**	**0.00**	**0.15**	**0.00**	**0.00**
Survey Zone 6											
Kettering Town Centre	5.90	1.18	18.06	7.79	39.18	43.52	28.88	2.75	4.78	3.26	0.71
Northfield Avenue Retail Park, Kettering	1.03	0.00	4.07	2.70	5.34	10.56	3.17	0.09	1.25	0.17	0.00
Kettering Retail Park, Kettering	0.39	0.23	1.91	1.06	4.74	6.95	4.14	0.00	1.74	0.33	0.00
Tesco, Carina Way, Kettering	0.00	0.00	0.54	0.43	9.62	4.68	4.03	0.93	0.29	0.09	0.00
Venture Retail Park, Kettering	0.00	0.00	1.08	0.56	3.90	3.23	0.99	0.00	1.44	0.17	0.00
B&Q, Meadow Road, Kettering	0.46	0.09	1.25	0.68	2.42	4.18	2.21	0.19	0.00	0.00	0.00
Other destinations, Kettering	0.00	0.00	0.88	0.22	0.40	2.84	0.58	0.00	0.00	0.00	0.00
Sub-total for Survey Zone 6	**7.79**	**1.49**	**27.78**	**13.45**	**65.61**	**75.96**	**44.00**	**3.96**	**9.49**	**4.03**	**0.71**
Survey Zone 7											
Thrapston	0.00	0.00	0.00	0.00	0.00	0.00	3.51	0.00	0.00	0.14	0.00
Sub-total for Survey Zone 7	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**3.51**	**0.00**	**0.00**	**0.14**	**0.00**
Survey Zone 8											
All centres in Survey Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.87	0.00	0.11	0.00
Sub-total for Survey Zone 8	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**3.87**	**0.00**	**0.11**	**0.00**
Survey Zone 9											
Wellingborough town centre	0.00	0.00	0.00	0.11	1.64	0.24	1.89	3.27	35.51	8.33	31.00
Castlefields Retail Park, Wellingborough	0.00	0.22	0.00	0.11	0.95	0.77	2.71	2.01	5.68	5.20	9.59
Tesco, Victoria Retail Parl, W'borough	0.00	0.00	0.00	0.00	0.12	0.09	0.19	0.96	4.36	2.38	4.42
Other stores, Victoria Retail Park, W'borough	0.00	0.00	0.00	0.00	0.48	0.04	0.69	0.98	4.69	0.83	4.26
Other destinations, Survey Zone 9	0.00	0.00	0.11	0.00	0.12	0.00	0.67	0.85	2.82	0.90	0.71
Sub-total for Survey Zone 9	**0.00**	**0.22**	**0.11**	**0.22**	**3.31**	**1.15**	**6.15**	**8.07**	**53.06**	**17.65**	**49.98**
Survey Zone 10											
Rushden town centre	0.00	0.00	0.00	0.00	0.77	0.22	2.00	0.15	0.69	22.09	6.53
Asda, Washbrook Road, Rushden	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.46	6.09	0.45
Waitrose Food & Home, Rushden	0.00	0.13	0.00	0.00	0.82	0.00	2.17	0.26	0.61	3.86	1.05
Raunds town centre	0.00	0.00	0.00	0.00	0.00	0.00	1.04	0.00	0.00	3.22	0.00
Other destinations, Survey Zone 10	0.00	0.00	0.00	0.00	0.25	0.16	0.68	0.00	0.38	2.27	0.40
Sub-total for Survey Zone 10	**0.00**	**0.13**	**0.00**	**0.00**	**1.84**	**0.38**	**5.89**	**0.41**	**2.14**	**37.52**	**8.42**
Survey Zone 11											
All centres in Survey Zone 11	0.00	0.00	0.00	0.00	0.00	0.08	0.00	0.00	0.00	0.00	1.16
Sub-total for Survey Zone 11	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.08**	**0.00**	**0.00**	**0.00**	**0.00**	**1.16**
Sub-total for catchment area	**55.68**	**20.42**	**44.10**	**78.63**	**78.63**	**86.94**	**72.22**	**17.06**	**65.14**	**60.19**	**60.27**
Destinations outside catchment area											
Northampton town centre and retail parks	0.55	1.78	4.57	6.00	8.16	5.01	3.23	61.59	23.23	22.19	20.54
Peterborough city centre and retail parks	13.38	46.76	1.84	4.43	1.64	0.47	18.49	0.21	0.15	0.84	0.00
Milton Keynes town centre and retail parks	0.00	0.77	1.23	2.57	3.99	2.99	3.81	10.45	6.71	8.25	15.40
Market Harborough town centre and retail parks	1.47	0.14	34.14	0.58	2.07	0.14	0.00	3.57	0.13	0.18	0.00
Leicester city centre, Fosse Park, retail parks	9.65	1.30	8.83	3.97	1.89	2.13	0.00	1.47	0.59	0.42	0.00
Stamford town centre and retail parks	5.51	20.33	0.19	0.24	0.50	0.00	0.00	0.00	0.17	0.00	0.00
Bedford town centre and retail parks	0.00	0.00	0.00	0.00	0.28	0.16	0.00	0.00	0.99	5.19	0.53
Other centres outside catchment area	13.77	8.50	5.10	3.57	2.84	2.17	2.24	5.65	2.88	2.73	3.27
Sub-total for outside catchment area	**44.32**	**79.58**	**55.90**	**21.37**	**21.37**	**13.06**	**27.78**	**82.94**	**34.86**	**39.81**	**39.73**
Overall total	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**

Notes
Source: NEMS Market Research household survey, 2010

Table CM5 —
Comparison goods spending patterns (2014)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total comparison goods expenditure, 2014	31.70	74.83	84.20	122.19	79.17	118.66	47.95	73.14	153.68	157.38	34.85	977.74
Survey Zone 1												
Uppingham	2.57	0.32	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.96
Sub-total for Survey Zone 1	**2.57**	**0.32**	**0.07**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**2.96**
Survey Zone 2												
Oundle	0.00	5.33	0.00	0.00	0.34	0.00	0.00	0.00	0.13	0.00	0.00	5.80
Sub-total for Survey Zone 2	**0.00**	**5.33**	**0.00**	**0.00**	**0.34**	**0.00**	**0.00**	**0.00**	**0.13**	**0.00**	**0.00**	**5.80**
Survey Zone 3												
All centres in Survey Zone 3	0.00	0.00	3.71	0.13	0.16	0.00	0.00	0.21	0.00	0.00	0.00	4.20
Sub-total for Survey Zone 3	**0.00**	**0.00**	**3.71**	**0.13**	**0.16**	**0.00**	**0.00**	**0.21**	**0.00**	**0.00**	**0.00**	**4.20**
Survey Zone 4												
Corby town centre	7.04	4.28	3.21	51.33	1.84	4.20	2.24	0.15	0.32	0.33	0.00	74.95
Phoenix Retail Park, Corby	2.77	1.49	4.15	15.30	1.39	3.65	2.58	0.00	0.00	0.83	0.00	32.17
Asda, Phoenix Parkway, Corby	2.81	2.50	2.43	11.68	0.67	2.82	1.26	0.19	0.00	0.00	0.00	24.35
Other destinations, Corby	0.00	0.00	0.07	0.95	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.02
Sub-total for Survey Zone 4	**12.62**	**8.27**	**9.86**	**79.25**	**3.91**	**10.67**	**6.08**	**0.34**	**0.32**	**1.17**	**0.00**	**132.48**
Survey Zone 5												
Burton Latimer	0.00	0.00	0.00	0.00	1.82	0.45	0.00	0.00	0.24	0.00	0.00	2.51
Sub-total for Survey Zone 5	**0.00**	**0.00**	**0.00**	**0.00**	**1.82**	**0.45**	**0.00**	**0.00**	**0.24**	**0.00**	**0.00**	**2.51**
Survey Zone 6												
Kettering Town Centre	1.87	0.88	15.20	9.52	31.02	51.65	13.85	2.01	7.34	5.13	0.25	138.72
Northfield Avenue Retail Park, Kettering	0.33	0.00	3.43	3.30	4.23	12.54	1.52	0.06	1.92	0.27	0.00	27.60
Kettering Retail Park, Kettering	0.12	0.17	1.61	1.30	3.76	8.24	1.99	0.00	2.67	0.52	0.00	20.37
Tesco, Carina Way, Kettering	0.00	0.00	0.46	0.52	7.62	5.55	1.93	0.68	0.44	0.14	0.00	17.33
Venture Retail Park, Kettering	0.00	0.00	0.91	0.69	3.09	3.83	0.47	0.00	2.21	0.27	0.00	11.48
B&Q, Meadow Road, Kettering	0.15	0.06	1.05	0.83	1.92	4.96	1.06	0.14	0.00	0.00	0.00	10.17
Other destinations, Kettering	0.00	0.00	0.74	0.27	0.32	3.37	0.28	0.00	0.00	0.00	0.00	4.98
Sub-total for Survey Zone 6	**2.47**	**1.12**	**23.39**	**16.44**	**51.94**	**90.14**	**21.10**	**2.89**	**14.58**	**6.34**	**0.25**	**230.66**
Survey Zone 7												
Thrapston	0.00	0.00	0.00	0.00	0.00	0.00	1.68	0.00	0.00	0.22	0.00	1.90
Sub-total for Survey Zone 7	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**1.68**	**0.00**	**0.00**	**0.22**	**0.00**	**1.90**
Survey Zone 8												
All centres in Survey Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.83	0.00	0.18	0.00	3.01
Sub-total for Survey Zone 8	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**2.83**	**0.00**	**0.18**	**0.00**	**3.01**
Survey Zone 9												
Wellingborough town centre	0.00	0.00	0.00	0.14	1.30	0.28	0.91	2.39	54.57	13.10	10.80	83.51
Castlefields Retail Park, Wellingborough	0.00	0.16	0.00	0.13	0.75	0.92	1.30	1.47	8.74	8.19	3.34	24.99
Tesco, Victoria Retail Parl, W'borough	0.00	0.00	0.00	0.00	0.10	0.11	0.09	0.70	6.70	3.75	1.54	12.99
Other stores, Victoria Retail Park, W'borough	0.00	0.00	0.00	0.00	0.38	0.05	0.33	0.72	7.20	1.31	1.49	11.48
Other destinations, Survey Zone 9	0.00	0.00	0.10	0.00	0.10	0.00	0.32	0.62	4.33	1.41	0.25	7.13
Sub-total for Survey Zone 9	**0.00**	**0.16**	**0.10**	**0.27**	**2.62**	**1.36**	**2.95**	**5.90**	**81.54**	**27.77**	**17.42**	**140.09**
Survey Zone 10												
Rushden town centre	0.00	0.00	0.00	0.00	0.61	0.26	0.96	0.11	1.05	34.76	2.27	40.02
Asda, Washbrook Road, Rushden	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.71	9.59	0.16	10.46
Waitrose Food & Home, Rushden	0.00	0.09	0.00	0.00	0.65	0.00	1.04	0.19	0.94	6.08	0.37	9.36
Raunds town centre	0.00	0.00	0.00	0.00	0.00	0.00	0.50	0.00	0.00	5.06	0.00	5.56
Other destinations, Survey Zone 10	0.00	0.00	0.00	0.00	0.20	0.19	0.33	0.00	0.58	3.57	0.14	5.00
Sub-total for Survey Zone 10	**0.00**	**0.09**	**0.00**	**0.00**	**1.46**	**0.45**	**2.82**	**0.30**	**3.29**	**59.05**	**2.94**	**70.40**
Survey Zone 11												
All centres in Survey Zone 11	0.00	0.00	0.00	0.00	0.00	0.10	0.00	0.00	0.00	0.00	0.40	0.50
Sub-total for Survey Zone 11	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.10**	**0.00**	**0.00**	**0.00**	**0.00**	**0.40**	**0.50**
Sub-total for catchment area	**17.65**	**15.28**	**37.13**	**96.08**	**62.25**	**103.16**	**34.63**	**12.48**	**100.10**	**94.73**	**21.00**	**594.50**
Destinations outside catchment area												
Northampton town centre and retail parks	0.17	1.33	3.85	7.33	6.46	5.94	1.55	45.05	35.70	34.92	7.16	149.45
Peterborough city centre and retail parks	4.24	34.99	1.55	5.42	1.29	0.56	8.87	0.15	0.24	1.33	0.00	58.63
Milton Keynes town centre and retail parks	0.00	0.58	1.04	3.14	3.16	3.54	1.83	7.65	10.31	12.99	5.37	49.61
Market Harborough town centre and retail parks	0.47	0.11	28.74	0.71	1.64	0.16	0.00	2.61	0.20	0.28	0.00	34.91
Leicester city centre, Fosse Park, retail parks	3.06	0.97	7.44	4.86	1.50	2.53	0.00	1.07	0.91	0.66	0.00	23.00
Stamford town centre and retail parks	1.75	15.21	0.16	0.29	0.40	0.00	0.00	0.00	0.26	0.00	0.00	18.07
Bedford town centre and retail parks	0.00	0.00	0.00	0.00	0.22	0.19	0.00	0.00	1.53	8.17	0.18	10.29
Other centres outside catchment area	4.37	6.36	4.29	4.37	2.25	2.58	1.07	4.13	4.43	4.30	1.14	39.28
Sub-total for outside catchment area	**14.05**	**59.55**	**47.07**	**26.11**	**16.92**	**15.50**	**13.32**	**60.66**	**53.57**	**62.65**	**13.85**	**383.24**
Overall total	**31.70**	**74.83**	**84.20**	**122.19**	**79.17**	**118.66**	**47.95**	**73.14**	**153.68**	**157.38**	**34.85**	**977.74**

Notes
Source: Table CM3, Table CM4.
All monetary values are held constant at 2012 prices

Table CM6 —

Commitments for retail floorspace (comparison goods)

CM6a: Retained Commitments from 2012 Update

Proposal	Turnover per sq.m (£)	Sales area (sq.m net)	Turnover (2012, £m)*	Turnover (2014, £m)**	Turnover (2018, £m)**
Northern Sub-Area					
DIY store, adjacent to Carina Way, Kettering	1,130	2,927	3.31	3.42	3.66
Stanier Close, Kettering (retail warehousing)	-	4,271	10.74	11.11	11.88
Dunelm Mill, Stainer Close (mezzaine floorspace only)	2,767	1,088	2.86	2.96	3.16
Priors Hall, Corby	2,500	2,450	6.13	6.34	6.78
Tesco Extra, St James Industrial Estate, Corby	-	2,685	26.10	26.99	28.88
Sub-total, Northern Sub-Area			**49.13**	**50.82**	**54.36**
Southern Sub-Area					
Extension to Sainsbury's, Wellingborough	7,052	185	1.31	1.35	1.45
Sub-total, Sothern Sub-Area			**1.31**	**1.35**	**1.45**
Total, retained commitments			**50.44**	**52.17**	**55.81**

Notes
*turnover figure used in 2012 RCSU
**allows for sales density growth of 1.5% per annum

CM6b: New comparison goods planning commitments

Proposal	Turnover per sq.m (£)	Sales area (sq.m net)	Turnover (2012, £m)	Turnover (2014, £m)**	Turnover (2018, £m)**
Northern Sub-Area					
Sub-division of former Wickes store, Northfield Avenue, Kettering	-	-	-	5.85	6.10
former Comet, Meadow Road, Kettering (section 73 application)	-	-	-	2.54	2.72
Pets at Home, Peel Centre - mezzanine floorspace	2,246	260	-	0.58	0.62
Waitrose, East Road, Oundle	-	139	-	1.40	1.50
Sainsbury's, Cattle Market, Thrapston	9,000	140	-	1.26	1.35
Rushden Lakes, Northampton Road, Rushden (turnover drawn from Northern Sub-Area zones)	-	-	-		12.45
Sub-total, Northern Sub-Area				**8.97**	**24.74**
Southern Sub-Area					
Retail floorspace at Wellingborough North urban extension (district centre)	2,500	1,100	-	-	2.75
Retail floorspace at Wellingborough North urban extension (local centres)	1,500	315	-	-	0.47
Retail floorspace at Wellingborough East urban extension (neighbourhood & local centres)	1,500	700	-	-	1.05
Country Buildings & former Knapp site, London Road, Wellingborough	-	257	-	3.90	4.17
Rushden Lakes, Northampton Road, Rushden (turnover drawn from Southern Sub-Area zones)	-	-	-	-	87.18
Station Road, Irthlingborough (change of use B2 to A1 for country goods store)	1,500	888	-	1.33	1.42
Sub-total, Southern Sub-Area				**5.23**	**97.05**
Total, new commitments				**14.20**	**121.79**

Notes
Source: local planning authority monitoring records, correct up to 30 April 2014, and planning application documents where appropriate.
Rushden Lakes turnover taken from appeal decision ref APP/G2815/V/12/2190175 - para 8.76 of Inspector's Report
Assumed that all commitments will commence trading by 2018.
Sales density growth of 1.5% per annum applied to commitments with a turnover at 2014.
All monetary values are held constant at 2012 prices

CM6c: Total comparison goods planning commitments

Sub-area	Turnover of existing commitments, 2018 (£m)	Turnover of new commitments, 2018 (£m)	Overall total, 2018 (£m)
Northern sub-area	54.36	24.74	**79.10**
Southern sub-area	1.45	97.05	**98.50**
Overall total	**55.81**	**121.79**	**177.60**

Notes
Source: Table CM6a and Table CM6b
All monetary values are held constant at 2012 prices

Removed Commitments from 2012 Update

Development	Reason for removal
Tesco, Lawrence's Factory site, Desborough (332 sq.m comparison goods floorspace)	Tesco have withdrawn from developing a store at this site.
Evolution Corby (14,211 sq.m comparison goods floorspace)	Development not proceeding
Former Knapp site, Wellingborough (pp for bulky goods retail)	Superseded by new permission on site (see below)
Rushden Lakes (1,316 sq.m comparison goods floorspace)	Assumed superseded by appeal decision permission (see below)

Table CM7a —

Comparison goods floorspace requirements to 2031 — Northern Sub-Area

Zones 2, 3, 4, 5, 6 and 7. Static expenditure retention.

		2014	2018	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	371,560	385,124	398,177	423,523	447,994
B	Total comparison goods expenditure (NNCA) (£m)	977.74	1,145.00	1,277.09	1,593.25	1,986.50
C	Total comparison goods expenditure (Northern Sub-Area) (£m)	527.00	622.36	698.09	878.45	1,104.05
Retained expenditure (as a proportion of NNCA spending)						
C	Retained comparison goods expenditure in NNCA (%)	34.3%	34.3%	34.3%	34.3%	34.3%
D	Retained comparison goods expenditure in NNCA (£m)	335.78	393.22	438.58	547.15	682.20
E	Comparison goods expenditure leakage from NNCA (£m)	641.97	751.79	838.51	1,046.10	1,304.30
Retained expenditure (as a proportion of Northern Sub-Area Spending)						
F	Retained comparison goods expenditure in Northern Sub-Area (%)	63.7%	63.7%	63.7%	63.7%	63.7%
G	Retained comparison goods expenditure in Northern Sub-Area (£m)	335.78	393.22	438.58	547.15	682.20
H	Comparison goods expenditure leakage from Northern Sub-Area (£m	191.22	229.15	259.51	331.30	421.85
Inflow						
I	Inflow (%)	11%	11%	11%	11%	11%
J	Inflow (£m)	41.77	48.91	54.56	68.06	84.86
Total turnover						
K	Baseline comparison goods turnover of stores (£m)	377.54	377.54	377.54	377.54	377.54
Initial surplus						
L	Growth in retained comparison goods expenditure (£m)	0.00	64.59	115.59	237.67	389.52
Claims on expenditure						
M	Sales efficiency growth in existing retailers (£m)	0.00	26.34	47.29	84.64	125.29
N	Comparison goods commitments (£m)	59.79	79.10	83.20	90.52	98.48
O	Total claims on capacity	59.79	105.43	130.49	175.16	223.77
Expenditure summary						
P	Initial surplus of comparison goods expenditure (£m)	0.00	64.59	115.59	237.67	389.52
Q	Total claims on capacity (£m)	59.79	105.43	130.49	175.16	223.77
R	Residual comparison goods expenditure (£m)	-59.79	-40.85	-14.90	62.51	165.75
Conversion to floorspace need						
S	Assumed turnover per sq.m (£ per sq.m)	5,000	5,349	5,626	6,121	6,659
T	**Comparison goods floorspace need (sq.m net)**	**-11,958**	**-7,637**	**-2,648**	**10,212**	**24,890**
U	Comparison goods floorspace need (sq.m gross)	-17,083	-10,910	-3,783	14,588	35,557

Notes
Total comparison goods expenditure retained by stores in zones 2, 3, 4, 5, 6 and 7
Inflow is spending at centres in the Northern Sub-Area from residents in the Southern Sub-Area (source: Table CM5)
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CM7b —

Comparison goods floorspace requirements to 2031 — Northern Sub-Area

Zones 2, 3, 4, 5, 6 and 7. Increased expenditure retention.

		2014	2018	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	371,560	385,124	398,177	423,523	447,994
B	Total comparison goods expenditure (NNCA) (£m)	977.74	1,145.00	1,277.09	1,593.25	1,986.50
C	Total comparison goods expenditure (Northern Sub-Area) (£m)	527.00	622.36	698.09	878.45	1,104.05
Retained expenditure (as a proportion of NNCA spending)						
C	Retained comparison goods expenditure in NNCA (%)	34.3%	34.3%	37.6%	37.6%	37.6%
D	Retained comparison goods expenditure in NNCA (£m)	335.78	393.22	479.69	603.62	758.64
E	Comparison goods expenditure leakage from NNCA (£m)	641.97	751.79	797.40	989.63	1,227.85
Retained expenditure (as a proportion of Northern Sub-Area Spending)						
F	Retained comparison goods expenditure in Northern Sub-Area (%)	63.7%	63.7%	68.7%	68.7%	68.7%
G	Retained comparison goods expenditure in Northern Sub-Area (£m)	335.78	396.54	479.69	603.62	758.64
H	Comparison goods expenditure leakage from Northern Sub-Area (£m	191.22	225.83	218.40	274.83	345.41
Inflow						
I	Inflow (%)	11%	11%	11%	11%	11%
J	Inflow (£m)	41.77	48.91	54.56	68.06	84.86
Total turnover						
K	Baseline comparison goods turnover of stores (£m)	377.54	377.54	377.54	377.54	377.54
Initial surplus						
L	Growth in retained comparison goods expenditure (£m)	0.00	64.59	156.70	294.14	465.96
Claims on expenditure						
M	Sales efficiency growth in existing retailers (£m)	0.00	26.34	47.29	84.64	125.29
N	Comparison goods commitments (£m)	59.79	79.10	83.20	90.52	98.48
O	Total claims on capacity	59.79	105.43	130.49	175.16	223.77
Expenditure summary						
P	Initial surplus of comparison goods expenditure (£m)	0.00	64.59	156.70	294.14	465.96
Q	Total claims on capacity (£m)	59.79	105.43	130.49	175.16	223.77
R	Residual comparison goods expenditure (£m)	-59.79	-40.85	26.21	118.98	242.19
Conversion to floorspace need						
S	Assumed turnover per sq.m (£ per sq.m)	5,000	5,349	5,626	6,121	6,659
T	**Comparison goods floorspace need (sq.m net)**	**-11,958**	**-7,637**	**4,659**	**19,437**	**36,369**
U	Comparison goods floorspace need (sq.m gross)	-17,083	-10,910	6,656	27,768	51,956

Notes
Total comparison goods expenditure retained by stores in zones 2, 3, 4, 5, 6 and 7
Inflow is spending at centres in the Northern Sub-Area from residents in the Southern Sub-Area (source: Table CM5)
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CM7c —

Comparison goods floorspace requirements to 2031 — Southern Sub-Area

Zones 8, 9, 10 and 11. Static expenditure retention

		2014	2018	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	371,560	385,124	398,177	423,523	447,994
B	Total comparison goods expenditure (NNCA) (£m)	977.74	1,145.00	1,277.09	1,593.25	1,986.50
C	Total comparison goods expenditure (Southern Sub-Area) (£m)	419.04	484.78	536.56	662.08	817.46
Retained expenditure (as a proportion of NNCA spending)						
C	Retained comparison goods expenditure in NNCA (%)	20.6%	20.6%	20.6%	20.6%	20.6%
D	Retained comparison goods expenditure in NNCA (£m)	201.63	236.12	263.36	328.56	409.65
E	Comparison goods expenditure leakage from NNCA (£m)	776.11	908.88	1,013.73	1,264.69	1,576.85
Retained expenditure (as a proportion of Southern Sub-Area Spending)						
F	Retained comparison goods expenditure in Southern Sub-Area (%)	48.1%	48.1%	48.1%	48.1%	48.1%
G	Retained comparison goods expenditure in Southern Sub-Area (£m)	201.63	236.12	263.36	328.56	409.65
H	Comparison goods expenditure leakage from Southern Sub-Area (£m	217.41	248.66	273.20	333.52	407.81
Inflow						
I	Inflow (%)	6%	6%	6%	6%	6%
J	Inflow (£m)	12.37	14.49	16.16	20.16	25.14
Total turnover						
K	Baseline comparison goods turnover of stores (£m)	214.00	214.00	214.00	214.00	214.00
Initial surplus						
L	Growth in retained comparison goods expenditure (£m)	0.00	36.61	65.52	134.72	220.79
Claims on expenditure						
M	Sales efficiency growth in existing retailers (£m)	0.00	14.93	26.80	47.98	71.02
N	Comparison goods commitments (£m)	6.59	98.50	103.61	112.72	122.63
O	Total claims on capacity	6.59	113.43	130.41	160.70	193.65
Expenditure summary						
P	Initial surplus of comparison goods expenditure (£m)	0.00	36.61	65.52	134.72	220.79
Q	Total claims on capacity (£m)	6.59	113.43	130.41	160.70	193.65
R	Residual comparison goods expenditure (£m)	-6.59	-76.82	-64.89	-25.98	27.14
Conversion to floorspace need						
S	Assumed turnover per sq.m (£ per sq.m)	5,000	5,349	5,626	6,121	6,659
T	**Comparison goods floorspace need (sq.m net)**	**-1,317**	**-14,362**	**-11,534**	**-4,245**	**4,075**
U	Comparison goods floorspace need (sq.m gross)	-1,882	-20,517	-16,477	-6,064	5,822

Notes
Total comparison goods expenditure retained by stores in zones 8, 9, 10 and 11
Inflow is spending at centres in the Southern Sub-Area from residents in the Northern Sub-Area (source: Table CM5)
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CM7d —

Comparison goods floorspace requirements to 2031 — Southern Sub-Area

Zones 8, 9, 10 and 11. Increasing expenditure retention

		2014	2018	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	371,560	385,124	398,177	423,523	447,994
B	Total comparison goods expenditure (NNCA) (£m)	977.74	1,145.00	1,277.09	1,593.25	1,986.50
C	Total comparison goods expenditure (Southern Sub-Area) (£m)	419.04	484.78	536.56	662.08	817.46
Retained expenditure (as a proportion of NNCA spending)						
D	Retained comparison goods expenditure in NNCA (£m)	201.63	279.88	309.77	382.23	471.94
E	Comparison goods expenditure leakage from NNCA (£m)	776.11	865.12	967.32	1,211.01	1,514.56
Retained expenditure (as a proportion of Southern Sub-Area Spending)						
F	Retained comparison goods expenditure in Southern Sub-Area (%)	48.1%	57.7%	57.7%	57.7%	57.7%
G	Retained comparison goods expenditure in Southern Sub-Area (£m)	201.63	279.88	309.77	382.23	471.94
H	Comparison goods expenditure leakage from Southern Sub-Area (£m	217.41	204.91	226.79	279.84	345.52
Inflow						
I	Inflow (%)	6%	6%	6%	6%	6%
J	Inflow (£m)	12.37	14.49	16.16	20.16	25.14
Total turnover						
K	Baseline comparison goods turnover of stores (£m)	214.00	214.00	214.00	214.00	214.00
Initial surplus						
L	Growth in retained comparison goods expenditure (£m)	0.00	80.37	111.93	188.39	283.08
Claims on expenditure						
M	Sales efficiency growth in existing retailers (£m)	0.00	14.93	26.80	47.98	71.02
N	Comparison goods commitments (£m)	6.59	98.50	103.61	112.72	122.63
O	Total claims on capacity	6.59	113.43	130.41	160.70	193.65
Expenditure summary						
P	Initial surplus of comparison goods expenditure (£m)	0.00	80.37	111.93	188.39	283.08
Q	Total claims on capacity (£m)	6.59	113.43	130.41	160.70	193.65
R	Residual comparison goods expenditure (£m)	-6.59	-33.06	-18.48	27.70	89.43
Conversion to floorspace need						
S	Assumed turnover per sq.m (£ per sq.m)	5,000	5,349	5,626	6,121	6,659
T	**Comparison goods floorspace need (sq.m net)**	**-1,317**	**-6,181**	**-3,285**	**4,525**	**13,429**
U	Comparison goods floorspace need (sq.m gross)	-1,882	-8,830	-4,693	6,464	19,184

Notes
Total comparison goods expenditure retained by stores in zones 8, 9, 10 and 11
Inflow is spending at centres in the Southern Sub-Area from residents in the Northern Sub-Area (source: Table CM5)
Sales efficiency growth of 1.5% per annum applied.
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate
Total requirement shown is cumulative.
Gross: net ratio of 70% applied.
All monetary values held constant at 2012 prices.

Table CV1 —

Population projections

	2012	2014	2018	2021	2026	2031	Change, 2014-31
Zone 1	11,085	11,318	11,938	12,387	13,082	13,644	2,326
Zone 2	23,852	24,094	24,633	25,248	26,464	27,565	3,471
Zone 3	28,485	28,950	29,896	30,766	32,393	34,003	5,052
Zone 4	57,264	59,700	64,978	69,542	78,235	86,756	27,056
Zone 5	25,592	26,010	26,860	27,642	29,103	30,549	4,539
Zone 6	49,785	50,599	52,251	53,772	56,615	59,428	8,830
Zone 7	14,767	14,917	15,250	15,631	16,384	17,065	2,149
Zone 8	23,255	23,648	24,449	25,053	26,091	27,050	3,402
Zone 9	64,550	64,819	65,917	67,478	71,037	74,619	9,800
Zone 10	55,261	55,821	57,070	58,494	61,313	63,862	8,042
Zone 11	11,637	11,685	11,883	12,165	12,806	13,452	1,767
Total	**365,533**	**371,560**	**385,124**	**398,177**	**423,523**	**447,994**	**76,434**

Notes

Base year (2012) populations are sourced from Experian MMG3, bespoke for study area zones.

Population projections for zones 1, 8 and 11 are sourced from Experian MMG3, based on ONS Sub-National population projections.

Population projections for all other zones are dervied from district-level population projections provided by the NNJPU, which take into account planned levels of housing growth. The following district-wide growth rates have been applied:

- Zones 2, 7 - Growth rates for East Northamptonshire: Rural North, Oundle and Thrapston
- Zones 3, 5 and 6 - Growth rates for Kettering Borough
- Zone 9 - Growth rates for Borough of Wellingborough
- Zone 10 - Growth rates for East Northamptonshire: Four Towns

Table CV2 —
Per capita convenience goods expenditure

	2012	2014	2018	2021	2026	2031
	£	£	£	£	£	£
Zone 1	2,016	1,980	2,000	2,036	2,098	2,161
Zone 2	2,121	2,082	2,103	2,141	2,206	2,273
Zone 3	2,106	2,069	2,089	2,127	2,192	2,258
Zone 4	1,756	1,725	1,742	1,774	1,827	1,883
Zone 5	2,148	2,109	2,131	2,169	2,235	2,303
Zone 6	1,849	1,815	1,834	1,867	1,923	1,982
Zone 7	2,225	2,185	2,206	2,246	2,315	2,385
Zone 8	2,179	2,140	2,161	2,200	2,267	2,336
Zone 9	1,878	1,844	1,863	1,897	1,954	2,014
Zone 10	2,005	1,969	1,989	2,025	2,087	2,150
Zone 11	2,165	2,126	2,147	2,186	2,253	2,321

Notes

The following expenditure growth rates are applied (source: Experian Retail Planner Briefing Note 12, October 2014, Figures 1a and 1b):

2012-13:	-0.50%	
2013-14:	-1.30%	
2014-15:	-0.50%	
2015-16:	0.50%	
2016-17:	0.40%	
2017-21:	0.60%	(per annum)
2021-31:	0.60%	(per annum)

Source: Experian MMG3 (2012 data in 2012 prices).
All monetary values held constant at 2012 prices.

Table CV3 —
Total convenience goods expenditure

a. Total expenditure (Table CV1 x Table CV2)

	2014	2018	2021	2026	2031
	£m	£m	£m	£m	£m
Zone 1	22.41	23.87	25.22	27.44	29.49
Zone 2	50.17	51.81	54.06	58.39	62.66
Zone 3	59.89	62.46	65.44	70.99	76.78
Zone 4	102.97	113.19	123.34	142.97	163.35
Zone 5	54.87	57.23	59.96	65.05	70.35
Zone 6	91.86	95.81	100.38	108.90	117.78
Zone 7	32.59	33.65	35.11	37.92	40.70
Zone 8	50.60	52.84	55.13	59.16	63.19
Zone 9	119.56	122.80	127.98	138.82	150.25
Zone 10	109.93	113.51	118.46	127.93	137.30
Zone 11	24.85	25.52	26.60	28.85	31.22
Total	**719.69**	**752.69**	**791.68**	**866.42**	**943.09**

b. Spending on Special Forms of Trading, e.g. internet shopping

	2014	2018	2021	2026	2031
SFT rate	2.60%	3.60%	4.40%	5.00%	5.60%
	£m	£m	£m	£m	£m
Zone 1	0.58	0.86	1.11	1.37	1.65
Zone 2	1.30	1.87	2.38	2.92	3.51
Zone 3	1.56	2.25	2.88	3.55	4.30
Zone 4	2.68	4.07	5.43	7.15	9.15
Zone 5	1.43	2.06	2.64	3.25	3.94
Zone 6	2.39	3.45	4.42	5.44	6.60
Zone 7	0.85	1.21	1.54	1.90	2.28
Zone 8	1.32	1.90	2.43	2.96	3.54
Zone 9	3.11	4.42	5.63	6.94	8.41
Zone 10	2.86	4.09	5.21	6.40	7.69
Zone 11	0.65	0.92	1.17	1.44	1.75
Total	**18.71**	**27.10**	**34.83**	**43.32**	**52.81**

c. Residual comparison goods expenditure (Table a less Table b)

	2014	2018	2021	2026	2031
	£m	£m	£m	£m	£m
Zone 1	21.83	23.01	24.11	26.07	27.84
Zone 2	48.87	49.94	51.69	55.47	59.16
Zone 3	58.33	60.21	62.56	67.44	72.48
Zone 4	100.29	109.12	117.91	135.82	154.21
Zone 5	53.44	55.17	57.32	61.79	66.41
Zone 6	89.47	92.36	95.96	103.45	111.18
Zone 7	31.74	32.44	33.57	36.03	38.42
Zone 8	49.29	50.94	52.70	56.20	59.65
Zone 9	116.45	118.38	122.35	131.88	141.84
Zone 10	107.07	109.43	113.24	121.54	129.61
Zone 11	24.20	24.60	25.43	27.41	29.48
Total	**700.98**	**725.59**	**756.84**	**823.10**	**890.27**

Notes
Source: Table CV1, Table CV2
Special forms of trading ('SFT') discount source: Experian Retail Planner Briefing Note 12, October 2014, Appendix 3 ('adjusted' percentage figures to take into account store-picked goods)
The main component of SFT is online shopping.

All monetary values are held constant at 2012 prices.

Table CV4 —
Convenience goods market shares (2010-based)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11
	%	%	%	%	%	%	%	%	%	%	%
Survey Zone 1											
Co-operative Food, North Street East, UPPINGHAM	17.62	0.00	0.12	0.00	0.00	0.00	0.00	0.00	0.00	0.26	0.00
Other foodstores in Survey Zone 1	6.35	0.15	0.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sub-total for Survey Zone 1	**23.96**	**0.15**	**0.26**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.26**	**0.00**
Survey Zone 2											
Co-operative Food, St Osyths Lane, OUNDLE	0.00	17.69	0.00	0.13	0.00	0.00	0.36	0.00	0.00	0.00	0.00
Other foodstores, OUNDLE	0.00	5.72	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other foodstores elsewhere in Survey Zone 2	0.00	2.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sub-total for Survey Zone 2	**0.00**	**25.50**	**0.00**	**0.13**	**0.00**	**0.00**	**0.36**	**0.00**	**0.00**	**0.00**	**0.00**
Survey Zone 3											
Co-op Supermarket, Gladstone Street, DESBOROUGH	0.00	0.00	4.94	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Co-op Supermarket, Bell Hill, ROTHWELL	0.00	0.00	3.06	0.00	0.30	0.00	0.00	0.00	0.00	0.56	0.00
Other foodstores in Survey Zone 3	0.00	0.00	3.61	0.87	1.38	0.28	0.00	0.19	0.11	0.00	0.00
Sub-total for Survey Zone 3	**0.00**	**0.00**	**11.61**	**0.87**	**1.68**	**0.28**	**0.00**	**0.19**	**0.11**	**0.56**	**0.00**
Survey Zone 4											
Asda, Phoenix Park Way, CORBY	40.20	11.72	13.80	47.15	2.05	4.10	9.11	0.00	0.00	0.00	0.00
Morrisons, Oakley Road, Snatchill, CORBY	6.65	2.11	3.19	27.37	0.00	0.31	2.28	0.00	0.00	0.00	0.00
Iceland, Corporation Street, CORBY	0.00	0.00	0.00	4.26	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Aldi, Rockingham Road, CORBY	4.04	1.25	1.76	1.89	0.00	0.00	1.17	0.00	0.00	0.00	0.00
Co-Op Extra Foodstore, Alexandra Road, CORBY	0.50	0.23	0.78	2.98	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other foodstores in Survey Zone 4	1.26	0.00	2.37	8.24	1.19	0.28	0.00	0.00	0.00	0.00	0.00
Sub-total for Survey Zone 4	**52.64**	**15.31**	**21.90**	**91.89**	**3.24**	**4.69**	**12.56**	**0.00**	**0.00**	**0.00**	**0.00**
Survey Zone 5											
Sainsbury's, High Street, BURTON LATIMER	0.00	0.00	0.00	0.00	10.77	0.88	0.00	0.00	1.51	0.00	0.00
Other foodstores in Survey Zone 5	0.00	0.00	0.00	0.00	4.01	0.16	0.00	0.00	0.00	0.00	0.00
Sub-total for Survey Zone 5	**0.00**	**0.00**	**0.00**	**0.00**	**14.78**	**1.05**	**0.00**	**0.00**	**1.51**	**0.00**	**0.00**
Survey Zone 6											
Tesco, Kettering Business Park, Carina Road, KETTERING	0.00	0.00	6.03	2.32	32.24	27.10	22.23	2.64	2.15	0.26	0.00
Morrisons, Lower Street, KETTERING	0.00	0.00	11.82	1.50	10.42	23.21	5.73	2.64	0.54	0.56	0.00
Sainsbury's, Rockingham Road, KETTERING	3.10	0.62	4.53	2.25	15.11	24.45	5.66	1.15	0.43	0.00	0.00
Co-Op Extra Superstore, Cunliffe Drive, KETTERING	0.00	0.00	2.98	0.00	2.81	6.17	0.00	0.00	0.00	0.00	0.00
Other foodstores in Survey Zone 6	0.32	7.36	5.28	0.00	7.33	8.73	1.50	1.48	0.11	2.06	0.00
Sub-total for Survey Zone 6	**3.43**	**7.98**	**30.62**	**6.06**	**67.90**	**89.66**	**35.12**	**7.91**	**3.23**	**2.87**	**0.00**
Survey Zone 7											
Co-operative Food, Oundle Road, THRAPSTON	0.00	0.66	0.00	0.00	0.00	0.00	23.86	0.00	0.00	0.12	0.00
Other foodstores in Survey Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	4.75	0.00	0.00	0.00	0.00
Sub-total for Survey Zone 7	**0.00**	**0.66**	**0.00**	**0.00**	**0.00**	**0.00**	**28.61**	**0.00**	**0.00**	**0.12**	**0.00**
Survey Zone 8											
Co-operative Food, High Street, EARLS BARTON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.24	0.00	0.00	0.00
All foodstores, MOULTON	0.00	0.00	1.60	0.00	0.25	0.00	0.00	4.71	0.00	0.00	0.00
All foodstores, BRIXWORTH	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.72	0.00	0.00	0.00
Other foodstores in Survey Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.45	0.00	0.00	0.00
Sub-total for Survey Zone 8	**0.00**	**0.00**	**1.60**	**0.00**	**0.25**	**0.00**	**0.00**	**14.12**	**0.00**	**0.00**	**0.00**
Survey Zone 9											
Tesco, Victoria Park, Turnells Mill Lane, WELLINGBOROUGH	0.00	0.00	0.00	0.00	0.00	0.00	1.17	7.25	25.84	15.74	40.66
Morrisons, Oxford Street, WELLINGBOROUGH	0.00	0.00	0.00	0.00	0.00	0.00	2.28	7.10	28.97	8.69	17.98
Sainsbury's, Northampton Road, WELLINGBOROUGH	0.00	0.00	0.00	0.00	1.32	0.00	2.28	6.25	17.00	1.63	7.84
Other foodstores in Survey Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.25	2.43	15.09	1.34	2.68
Sub-total for Survey Zone 9	**0.00**	**0.00**	**0.00**	**0.00**	**1.32**	**0.00**	**5.98**	**23.04**	**86.90**	**27.40**	**69.16**
Survey Zone 10											
Asda, Washbrook Road, RUSHDEN	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.50	30.90	5.22
Waitrose Food & Home, Crown Park, RUSHDEN	0.00	2.52	0.00	0.13	2.51	0.39	12.11	2.48	1.40	12.67	7.08
Lidl, Brindley Close, RUSHDEN	0.00	0.00	0.00	0.00	0.00	0.00	1.11	0.00	0.85	3.30	1.33
Co-op, Brook Street, RAUNDS	0.00	0.00	0.00	0.00	0.00	0.00	1.80	0.00	0.11	4.09	0.00
Iceland, Eaton Walk, RUSHDEN	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.40	0.00
Other foodstores, RUSHDEN	0.00	0.00	0.00	0.00	1.42	0.00	0.00	1.15	1.52	6.36	1.78
Other foodstores elsewhere in Survey Zone 10	0.00	0.00	0.00	0.00	0.00	0.00	0.25	0.58	0.00	2.13	0.00
Sub-total for Survey Zone 10	**0.00**	**2.52**	**0.00**	**0.13**	**3.93**	**0.39**	**15.27**	**4.21**	**6.39**	**62.85**	**15.41**
Survey Zone 11											
Co-operative Food, Newton Road, WOLLASTON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.63
Welcome Co-Op, High Street, IRCHESTER	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.09
Other foodstores in Survey Zone 11	0.00	0.00	0.15	0.00	0.00	0.00	0.00	0.00	0.15	0.00	4.26
Sub-total for Survey Zone 11	**0.00**	**0.00**	**0.15**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.15**	**0.00**	**14.98**
Sub-total for catchment area	**80.03**	**52.12**	**66.13**	**99.08**	**93.10**	**96.07**	**97.89**	**49.47**	**98.28**	**94.06**	**99.55**
Destinations outside catchment area											
Sainsbury's, St Mary's Place, MARKET HARBOROUGH	0.00	0.00	25.48	0.00	1.17	0.00	0.00	1.48	0.00	0.00	0.00
Morrisons, Uffington Road, STAMFORD	6.21	23.73	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tesco Extra, 12 Weston Favell Centre, NORTHAMPTON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	15.91	0.22	0.56	0.00
Tesco Extra, Serpentine Green SC, PETERBOROUGH	0.00	10.05	0.00	0.00	0.00	0.00	1.11	0.00	0.00	0.00	0.00
Morrisons, Kettering Road, NORTHAMPTON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	9.33	0.00	0.00	0.00
Waitrose, The Kingsthorpe Centre, NORTHAMPTON	0.00	0.00	0.00	0.00	0.58	0.00	0.00	5.76	0.00	0.00	0.00
Waitrose, West Street, STAMFORD	1.81	4.44	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sainsbury's, Gambrel Road, NORTHAMPTON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.94	0.00	0.00	0.00
Sainsbury's, Oxney Road, Peterbrough	0.00	4.84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Asda, Harborough Way, Kingsthorpe, NORTHAMPTON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.37	0.43	0.00	0.00
Other foodstores outside catchment area	11.94	4.81	8.39	0.92	5.15	3.93	1.00	8.74	1.07	5.39	0.45
Sub-total for outside catchment area	**19.97**	**47.88**	**33.87**	**0.92**	**6.90**	**3.93**	**2.11**	**50.53**	**1.72**	**5.94**	**0.45**
Overall total	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**	**100.00**

Notes
Source: NEMS Market Research household survey, 2010

Table CV5 —
Convenience goods spending patterns (2014)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Total
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Total convenience goods expenditure, 2014	21.83	48.87	58	100.29	53.44	89.47	31.74	49.29	116.45	107.07	24.20	700.98
Survey Zone 1												
Co-operative Food, North Street East, UPPINGHAM	3.84	0.00	0.07	0.00	0.00	0.00	0.00	0.00	0.00	0.28	0.00	4.20
Other foodstores in Survey Zone 1	1.39	0.07	0.08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.54
Sub-total for Survey Zone 1	**5.23**	**0.07**	**0.15**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.28**	**0.00**	**5.73**
Survey Zone 2												
Co-operative Food, St Osyths Lane, OUNDLE	0.00	8.64	0.00	0.13	0.00	0.00	0.11	0.00	0.00	0.00	0.00	8.89
Other foodstores, OUNDLE	0.00	2.80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.80
Other foodstores elsewhere in Survey Zone 2	0.00	1.02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.02
Sub-total for Survey Zone 2	**0.00**	**12.46**	**0.00**	**0.13**	**0.00**	**0.00**	**0.11**	**0.00**	**0.00**	**0.00**	**0.00**	**12.71**
Survey Zone 3												
Co-op Supermarket, Gladstone Street, DESBOROUGH	0.00	0.00	2.88	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.88
Co-op Supermarket, Bell Hill, ROTHWELL	0.00	0.00	1.79	0.00	0.16	0.00	0.00	0.00	0.00	0.60	0.00	2.54
Other foodstores in Survey Zone 3	0.00	0.00	2.10	0.87	0.74	0.25	0.00	0.09	0.13	0.00	0.00	4.19
Sub-total for Survey Zone 3	**0.00**	**0.00**	**6.77**	**0.87**	**0.90**	**0.25**	**0.00**	**0.09**	**0.13**	**0.60**	**0.00**	**9.61**
Survey Zone 4												
Asda, Phoenix Park Way, CORBY	8.77	5.73	8.05	47.29	1.09	3.67	2.89	0.00	0.00	0.00	0.00	77.49
Morrisons, Oakley Road, Snatchill, CORBY	1.45	1.03	1.86	27.45	0.00	0.27	0.72	0.00	0.00	0.00	0.00	32.79
Iceland, Corporation Street, CORBY	0.00	0.00	0.00	4.27	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.27
Aldi, Rockingham Road, CORBY	0.88	0.61	1.03	1.90	0.00	0.00	0.37	0.00	0.00	0.00	0.00	4.79
Co-Op Extra Foodstore, Alexandra Road, CORBY	0.11	0.11	0.45	2.99	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.66
Other foodstores in Survey Zone 4	0.27	0.00	1.38	8.26	0.64	0.25	0.00	0.00	0.00	0.00	0.00	10.80
Sub-total for Survey Zone 4	**11.49**	**7.48**	**12.77**	**92.15**	**1.73**	**4.20**	**3.99**	**0.00**	**0.00**	**0.00**	**0.00**	**133.81**
Survey Zone 5												
Sainsbury's, High Street, BURTON LATIMER	0.00	0.00	0.00	0.00	5.76	0.79	0.00	0.00	1.76	0.00	0.00	8.30
Other foodstores in Survey Zone 5	0.00	0.00	0.00	0.00	2.15	0.15	0.00	0.00	0.00	0.00	0.00	2.29
Sub-total for Survey Zone 5	**0.00**	**0.00**	**0.00**	**0.00**	**7.90**	**0.94**	**0.00**	**0.00**	**1.76**	**0.00**	**0.00**	**10.59**
Survey Zone 6												
Tesco, Kettering Business Park, Carina Road, KETTERING	0.00	0.00	3.52	2.32	17.23	24.25	7.06	1.30	2.51	0.28	0.00	58.46
Morrisons, Lower Street, KETTERING	0.00	0.00	6.89	1.50	5.57	20.76	1.82	1.30	0.63	0.60	0.00	39.07
Sainsbury's, Rockingham Road, KETTERING	0.68	0.30	2.64	2.26	8.07	21.87	1.80	0.57	0.50	0.00	0.00	38.69
Co-Op Extra Superstore, Cunliffe Drive, KETTERING	0.00	0.00	1.74	0.00	1.50	5.52	0.00	0.00	0.00	0.00	0.00	8.76
Other foodstores in Survey Zone 6	0.07	3.59	3.08	0.00	3.92	7.81	0.48	0.73	0.13	2.20	0.00	22.01
Sub-total for Survey Zone 6	**0.75**	**3.90**	**17.86**	**6.08**	**36.29**	**80.22**	**11.15**	**3.90**	**3.76**	**3.08**	**0.00**	**166.97**
Survey Zone 7												
Co-operative Food, Oundle Road, THRAPSTON	0.00	0.32	0.00	0.00	0.00	0.00	7.57	0.00	0.00	0.13	0.00	8.03
Other foodstores in Survey Zone 7	0.00	0.00	0.00	0.00	0.00	0.00	1.51	0.00	0.00	0.00	0.00	1.51
Sub-total for Survey Zone 7	**0.00**	**0.32**	**0.00**	**0.00**	**0.00**	**0.00**	**9.08**	**0.00**	**0.00**	**0.13**	**0.00**	**9.54**
Survey Zone 8												
Co-operative Food, High Street, EARLS BARTON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.58	0.00	0.00	0.00	2.58
All foodstores, MOULTON	0.00	0.00	0.93	0.00	0.13	0.00	0.00	2.32	0.00	0.00	0.00	3.39
All foodstores, BRIXWORTH	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.34	0.00	0.00	0.00	1.34
Other foodstores in Survey Zone 8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.72	0.00	0.00	0.00	0.72
Sub-total for Survey Zone 8	**0.00**	**0.00**	**0.93**	**0.00**	**0.13**	**0.00**	**0.00**	**6.96**	**0.00**	**0.00**	**0.00**	**8.03**
Survey Zone 9												
Tesco, Victoria Park, Turnells Mill Lane, WELLINGBOROUGH	0.00	0.00	0.00	0.00	0.00	0.00	0.37	3.58	30.09	16.86	9.84	60.73
Morrisons, Oxford Street, WELLINGBOROUGH	0.00	0.00	0.00	0.00	0.00	0.00	0.72	3.50	33.73	9.30	4.35	51.61
Sainsbury's, Northampton Road, WELLINGBOROUGH	0.00	0.00	0.00	0.00	0.70	0.00	0.72	3.08	19.79	1.75	1.90	27.95
Other foodstores in Survey Zone 9	0.00	0.00	0.00	0.00	0.00	0.00	0.08	1.20	17.57	1.43	0.65	20.93
Sub-total for Survey Zone 9	**0.00**	**0.00**	**0.00**	**0.00**	**0.70**	**0.00**	**1.90**	**11.36**	**101.19**	**29.33**	**16.74**	**161.22**
Survey Zone 10												
Asda, Washbrook Road, RUSHDEN	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.92	33.08	1.26	37.26
Waitrose Food & Home, Crown Park, RUSHDEN	0.00	1.23	0.00	0.13	1.34	0.35	3.84	1.22	1.63	13.56	1.71	25.03
Lidl, Brindley Close, RUSHDEN	0.00	0.00	0.00	0.00	0.00	0.00	0.35	0.00	0.99	3.53	0.32	5.19
Co-op, Brook Street, RAUNDS	0.00	0.00	0.00	0.00	0.00	0.00	0.57	0.00	0.13	4.37	0.00	5.07
Iceland, Eaton Walk, RUSHDEN	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.64	0.00	3.64
Other foodstores, RUSHDEN	0.00	0.00	0.00	0.00	0.76	0.00	0.00	0.57	1.77	6.81	0.43	10.34
Other foodstores elsewhere in Survey Zone 10	0.00	0.00	0.00	0.00	0.00	0.00	0.08	0.28	0.00	2.29	0.00	2.65
Sub-total for Survey Zone 10	**0.00**	**1.23**	**0.00**	**0.13**	**2.10**	**0.35**	**4.85**	**2.08**	**7.44**	**67.29**	**3.73**	**89.19**
Survey Zone 11												
Co-operative Food, Newton Road, WOLLASTON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.61	1.61
Welcome Co-Op, High Street, IRCHESTER	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.99	0.99
Other foodstores in Survey Zone 11	0.00	0.00	0.08	0.00	0.00	0.00	0.00	0.00	0.18	0.00	1.03	1.29
Sub-total for Survey Zone 11	**0.00**	**0.00**	**0.08**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.18**	**0.00**	**3.63**	**3.89**
Sub-total for catchment area	**17.47**	**25.47**	**38.58**	**99.37**	**49.75**	**85.95**	**31.07**	**24.38**	**114.45**	**100.71**	**24.09**	**611.29**
Destinations outside catchment area												
Sainsbury's, St Mary's Place, MARKET HARBOROUGH	0.00	0.00	14.86	0.00	0.63	0.00	0.00	0.73	0.00	0.00	0.00	16.22
Morrisons, Uffington Road, STAMFORD	1.36	11.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12.95
Tesco Extra, 12 Weston Favell Centre, NORTHAMPTON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	7.84	0.26	0.60	0.00	8.69
Tesco Extra, Serpentine Green SC, PETERBOROUGH	0.00	4.91	0.00	0.00	0.00	0.00	0.35	0.00	0.00	0.00	0.00	5.26
Morrisons, Kettering Road, NORTHAMPTON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.60	0.00	0.00	0.00	4.60
Waitrose, The Kingsthorpe Centre, NORTHAMPTON	0.00	0.00	0.00	0.00	0.31	0.00	0.00	2.84	0.00	0.00	0.00	3.15
Waitrose, West Street, STAMFORD	0.40	2.17	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.57
Sainsbury's, Gambrel Road, NORTHAMPTON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.44	0.00	0.00	0.00	2.44
Sainsbury's, Oxney Road, Peterbrough	0.00	2.37	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.37
Asda, Harborough Way, Kingsthorpe, NORTHAMPTON	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.15	0.50	0.00	0.00	2.65
Other foodstores outside catchment area	2.61	2.35	4.89	0.92	2.75	3.52	0.32	4.31	1.25	5.77	0.11	28.80
Sub-total for outside catchment area	**4.36**	**23.40**	**19.75**	**0.92**	**3.69**	**3.52**	**0.67**	**24.90**	**2.00**	**6.36**	**0.11**	**89.69**
Overall total	**21.83**	**48.87**	**58.33**	**100.29**	**53.44**	**89.47**	**31.74**	**49.29**	**116.45**	**107.07**	**24.20**	**700.98**

Notes
Source: Table CV3, Table CV4.
All monetary values are held constant at 2012 prices

Table CV6 —

Commitments for retail floorspace (convenience goods)

CV6a: Retained Commitments from 2012 Update

Proposal	Turnover per sq.m (£)	Sales area (sq.m net)	Turnover (2012, £m)*	Turnover (2014, £m)	Turnover (2018, £m)**
Northern Sub-Area					
Asda, Cunliffe Drive, Kettering (trade adjustment)^	-	-	8.69	8.69	8.74
Priors Hall, Corby	10,000	2,450	-	-	24.50
Land west of Stanion, Corby	7,000	711	-	-	4.98
Tesco Extra, St James Industrial Estate, Corby (now trading)	-	4,986	-	67.10	67.91
Sub-total, Northern Sub-Area			**8.69**	**75.79**	**106.13**
Southern Sub-Area					
Extension to Sainsbury's, Wellingborough	10,942	378	4.14	4.14	4.16
M&S Simply Food, Victoria Retail Park, Wellingborough	11,587	706	8.18	8.18	8.23
Discount foodstore, Denington Road, Wellingborough	3,353	904	3.00	3.00	3.02
Sub-total, Southern Sub-Area			**15.32**	**15.32**	**15.41**
Total, retained commitments			**24.01**	**91.11**	**121.54**

Notes
*turnover figure used in 2012 RCSU
**allows for sales density growth of 0.3% per annum from 2016 onwards
^trade adjustment applied as this store was trading as a Co-Operative at the time of the NNRCS telephone survey

CV6b: New convenience goods planning commitments

Proposal	Turnover per sq.m (£)	Sales area (sq.m net)	Turnover (2012, £m)	Turnover (2014, £m)**	Turnover (2018, £m)**
Northern Sub-Area					
Waitrose, East Road, Oundle	-	1,255	-	12.20	12.27
Co-Operative foodstore, Hallwood Road, Kettering	-	-	-	2.20	2.35
Sainsbury's, Cattle Market, Thrapston	13,704	1,745	-	-	23.91
Sub-total, Northern Sub-Area				**14.40**	**38.54**
Southern Sub-Area					
Retail floorspace at Wellingborough North urban extension (district centre)	10,000	1,024	-	-	10.24
Retail floorspace at Wellingborough North urban extension (local centres)	5,000	260	-	-	1.30
Retail floorspace at Wellingborough East urban extension (neighbourhood & local centres)	5,000	975	-	-	4.88
Country Buildings & former Knapp site, London Road, Wellingborough	-	1,029	-	7.40	7.44
Former Express Works site, Church Street, Irthlingborough	-	1,858	-	14.99	15.08
Sainsbury's Local, High Street South, Rushden	13,704	208	-	2.85	2.87
Sub-total, Southern Sub-Area				**25.24**	**41.81**
Total, new commitments				**39.64**	**80.35**

Notes
1. Source: local planning authority monitoring records, correct up to 30 April 2014, and planning application documents where appropriate.
2. Rushden Lakes turnover taken from appeal decision ref APP/G2815/V/12/2190175 - para 8.76 of Inspector's Report
3. Great Harrowden is a permission for A1, A3, A4 and A5 floorspace, we have assumed 70% of floorspace in the district centre and 50% of floorspace in local centres will be A1 use. District centre floorspace is split between 50% comparison and 50% convenience, local centre floorspace is capped at 450 sq.m convenience. Gross: net ratio of 70% for comparison and 65% for conveneince goods floorspace applied to arrive at figures in commitments tables.
4. Assumed that all commitments will commence trading by 2018.
5. Sales density growth of 0.3% per annum applied to commitments with a turnover at 2014, from 2016 onwards.
6. All monetary values are held constant at 2012 prices

CV6c: Total convenience goods planning commitments

Sub-area	Turnover of existing commitments, 2018 (£m)	Turnover of new commitments, 2018 (£m)	Overall total, 2018 (£m)
Northern sub-area	106.13	38.54	**144.67**
Southern sub-area	15.41	41.81	**57.22**
Overall total	**121.54**	**80.35**	**201.89**

Notes
Source: Table CV6a and Table CV6b
All monetary values are held constant at 2012 prices

Removed Commitments from 2012 Update

Development	Reason for removal
Tesco, Lawrence's Factory site, Desborough (1,328 sq.m convenience goods floorspace)	Tesco have withdrawn from developing a store at this site.

Table CV7a —

Convenience goods floorspace requirements to 2031 — Northern Sub-Area

Zones 2, 3, 4, 5, 6 and 7. Static expenditure retention.

		2014	2018	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	371,560	385,124	398,177	423,523	447,994
B	Total convenience goods expenditure (£m)	700.98	725.59	756.84	823.10	890.27
Retained expenditure						
C	Retained convenience goods expenditure (%)	45%	45%	45%	45%	45%
D	Retained convenience goods expenditure (£m)	317.55	328.71	342.86	372.88	403.31
E	Convenience goods expenditure leakage (£m)	383.42	396.89	413.98	450.22	486.96
Inflow						
F	Inflow (%)	7%	7%	7%	7%	7%
G	Inflow (£m)	25.68	26.58	27.73	30.15	32.61
Total turnover						
H	Baseline convenience goods turnover of stores (£m)	343.23	343.23	343.23	343.23	343.23
Initial surplus						
I	Growth in retained convenience goods expenditure (£m)	0.00	12.05	27.36	59.80	92.69
Claims on expenditure						
J	Sales efficiency growth in existing retailers (£m)	0.00	2.06	5.18	10.44	15.77
K	Convenience goods commitments (£m)	90.19	144.67	146.85	149.07	151.32
L	Total claims on capacity	90.19	146.73	152.03	159.50	167.09
Expenditure summary						
M	Initial surplus of convenience goods expenditure (£m)	0.00	12.05	27.36	59.80	92.69
N	Total claims on capacity (£m)	90.19	146.73	152.03	159.50	167.09
O	Trading performance of existing foodstores	87.47	87.47	87.47	87.47	87.47
P	Residual convenience goods expenditure (£m)	-2.72	-47.21	-37.21	-12.24	13.07
Conversion to floorspace need						
Q	Assumed turnover per sq.m (£ per sq.m)	12,500	12,575	12,727	12,919	13,114
R	**Convenience goods floorspace need (sq.m net)**	**-218**	**-3,754**	**-2,923**	**-947**	**997**
S	Convenience goods floorspace need (sq.m gross)	-335	-5,776	-4,498	-1,457	1,533

Notes
Total comparison goods expenditure retained by stores in zones 2, 3, 4, 5, 6 and 7
No inflow is applied.
Sales efficiency growth of 0.3% per annum applied (2016 onwards)
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 65% applied.
All monetary values held constant at 2012 prices.

Table CV7b —

Convenience goods floorspace requirements to 2031 — Southern Sub-Area

Zones 8, 9, 10 and 11. Static expenditure retention.

		2014	2018	2021	2026	2031
Total population and expenditure						
A	Total population (persons)	371,560	385,124	398,177	423,523	447,994
B	Total convenience goods expenditure (£m)	700.98	725.59	756.84	823.10	890.27
Retained expenditure						
C	Retained convenience goods expenditure (%)	36%	36%	36%	36%	36%
D	Retained convenience goods expenditure (£m)	249.91	258.69	269.83	293.45	317.40
E	Convenience goods expenditure leakage (£m)	451.06	466.90	487.01	529.64	572.87
Inflow						
F	Inflow (%)	5%	5%	5%	5%	5%
G	Inflow (£m)	12.41	12.85	13.40	14.57	15.76
Total turnover						
H	Baseline convenience goods turnover of stores (£m)	262.32	262.32	262.32	262.32	262.32
Initial surplus						
I	Growth in retained convenience goods expenditure (£m)	0.00	9.21	20.91	45.70	70.84
Claims on expenditure						
J	Sales efficiency growth in existing retailers (£m)	0.00	3.16	5.56	9.60	13.70
K	Convenience goods commitments (£m)	40.56	57.22	57.74	58.61	59.49
L	Total claims on capacity (£m)	40.56	60.38	63.29	68.21	73.20
Expenditure summary						
M	Initial surplus of convenience goods expenditure (£m)	0.00	9.21	20.91	45.70	70.84
N	Total claims on capacity (£m)	40.56	60.38	63.29	68.21	73.20
O	Trading performance of existing foodstores	56.52	56.52	56.52	56.52	56.52
P	Residual convenience goods expenditure (£m)	15.96	5.35	14.14	34.02	54.17
Conversion to floorspace need						
Q	Assumed turnover per sq.m (£ per sq.m)	12,500	12,575	12,727	12,919	13,114
R	**Convenience goods floorspace need (sq.m net)**	**1,277**	**426**	**1,111**	**2,633**	**4,131**
S	Convenience goods floorspace need (sq.m gross)	1,965	655	1,709	4,051	6,355

Notes
Total comparison goods expenditure retained by stores in zones 8, 9, 10 and 11.
No inflow is applied.
Sales efficiency growth of 0.3% per annum applied (2016 onwards)
Turnover per sq.m at 2014 PBA estimate. Turnover per sq.m increased to 2031 in line with sales effiency growth rate.
Total requirement shown is cumulative.
Gross: net ratio of 65% applied.
All monetary values held constant at 2012 prices.

Appendix C Quantitative Need Methodology

Appendix: Quantitative Need Methodology

Summary of methodology

Our methodology for forecasting convenience (food) and comparison (non-food) retail needs follows a widely-adopted step-by-step methodology. The key steps of this are set out below, and should be read alongside the analysis in the main study report.

The technical inputs into each stage of the methodology which we have used for the purposes of this study are presented overleaf.

Step 1	Estimate the population growth over the course of the study period for each of the study area zones, using population projections agreed with the Council at the inception of the study. Define appropriate 'forecast years' at which to assess quantitative need.
Step 2	Establish the base year per capita (per head) spending on convenience (food) and comparison (non-food) goods, using published data sources. Apply appropriate growth rates to establish the expenditure per head in the forecast years.
Step 3	Calculate the 'pot' of expenditure within the study area at each of the forecast years by combining the population figures (calculated at **Step 1**) with the expenditure figures (calculated at **Step 2**), and making an allowance for Special Forms of Trading (SFT) such as internet / mobile shopping, catalogue shopping, and so on. SFT is increased in the forecast years to reflect the latest economic forecasts.
Step 4	Calculate the study area spending by applying the market share data from the household telephone survey to the overall 'pot' of expenditure (calculated at **Step 3**)
Step 5	Allow for any 'inflow' of expenditure from beyond the study area, if appropriate.
Step 6	Calculate the sales densities of existing retail floorspace, to assess turnover performance in the base year, and if appropriate make allowance for over or under-trading of this floorspace (i.e. the difference between the household survey-derived turnovers and the 'benchmark' turnovers)
Step 7	Project the spending forecasts forward to the forecast years.
Step 8	Make allowances for sales density growth (i.e. money ring-fenced to allow for the growth in productivity / turnover of existing retailers), and/or any commitments to new retail floorspace (i.e. extant planning permissions, or schemes under construction)
Step 9	Draw together steps 1 to 8 to assess whether there is any excess expenditure growth in the forecast years which can be translated into a quantitative need for new retail floorspace, by applying a typical sales density for new floorspace figure to the excess expenditure figure.
Step 10	Assess alternative policy scenarios, and / or the sensitivity testing of key assumptions.

Appendix D Summary of data inputs

Appendix: Technical inputs into capacity forecasts

<table>
<tr><th>Data</th><th>Source</th><th>How we have used the data</th></tr>
<tr><td>Base Population</td><td>Experian</td><td>Experian's MMG3 software provides 2012-based population forecasts at postcode sector level. The postcode sector populations are grouped together to form the study zones used for the purpose of our analysis.</td></tr>
<tr><td>Population Projections</td><td>NNJPU / Experian</td><td>The NNJPU have provided population projections at authority level for the study period to 2031. We have applied the growth rate derived from these population projections to each corresponding survey zone (e.g., zone 4, which covers Corby, uses the growth rate for Corby Borough). For zones within the NNCA but outside the administrative area of North Northamptonshire, Experian's MMG software provides annual population projections over the period to 2031, and we use these forecasts where applicable.</td></tr>
<tr><td>Base Per Capita Expenditure</td><td>Experian</td><td>Experian's MMG software provides per capita annual expenditure in each zone of the study area on convenience (food), comparison (non-food) and commercial leisure.</td></tr>
<tr><td>Retail and leisure expenditure growth forecasts</td><td>Experian</td><td>We have adopted expenditure growth rates from Experian Retail Planner Briefing Note 12 (Figures 1a and 1b), as follows:

<table>
<tr><th></th><th>Comparison goods</th><th>Convenience goods</th><th>Commercial leisure</th></tr>
<tr><td>2012-13</td><td>2.60%</td><td>-0.50%</td><td>-0.60%</td></tr>
<tr><td>2013-14</td><td>4.60%</td><td>-1.30%</td><td>0.00%</td></tr>
<tr><td>2014-15</td><td>5.60%</td><td>-0.50%</td><td>2.10%</td></tr>
<tr><td>2015-16</td><td>4.40%</td><td>0.50%</td><td>2.80%</td></tr>
<tr><td>2016-17</td><td>3.10%</td><td>0.40%</td><td>1.30%</td></tr>
<tr><td>2017-21*</td><td>3.10%</td><td>0.60%</td><td>1.10%</td></tr>
<tr><td>2021-31*</td><td>3.30%</td><td>0.60%</td><td>1.30%</td></tr>
</table>
*per annum growth rates</td></tr>
<tr><td>Base Year Special Forms of Trading (SFT)</td><td>Experian / Household survey</td><td>Special Forms of Trading refers to the amount of money not spent in bricks and mortar retail floorspace (includes internet, temporary markets etc…). Experian's Retail Planner Briefing Note 12 (Appendix 3) advises the following SFT discounts at the base year of the study:

Comparison goods (2014): 11.7%
Convenience goods (2014): 2.6%

For the purposes of our assessment we used the 'adjusted' figure presented by Experian, which makes allowance for store-picked online shopping transactions.</td></tr>
<tr><td>Growth in SFT</td><td>Experian</td><td>Experian's Retail Planner Briefing Note 12 (Appendix 3) advises the following SFT discounts at the study forecast years:

<table>
<tr><th></th><th>Comparison goods</th><th>Convenience goods</th></tr>
<tr><td>2017</td><td>14.0%</td><td>3.3%</td></tr>
<tr><td>2021</td><td>15.9%</td><td>4.4%</td></tr>
<tr><td>2026</td><td>15.9%</td><td>5.0%</td></tr>
<tr><td>2031</td><td>15.5%</td><td>5.6%</td></tr>
</table>
For the purposes of our assessment we used the 'adjusted' figure presented by Experian, which makes allowance for store-picked online shopping transactions. Experian do not project SFT to 2031 and therefore the 2026 is held constant for the remainder of the study period.</td></tr>
<tr><td>Retailer productivity changes</td><td>Experian/PBBI</td><td>Experian's forecast of retailer productivity changes outstrips the per capita expenditure growth figures highlighted above. We have therefore assumed the following productivity changes for the purposes of our quantitative analysis:

Comparison goods: 1.7% per annum, 2014-31
Convenience goods: 0% per annum, 2014-16; 0.3% per annum, 2016-31.</td></tr>
</table>