Introduction

1.1 GVA prepared the borough-wide Fareham Retail Study, October 2012. The purpose was to provide a sound and robust evidence base for the formulation of policies and strategic options within the Fareham Development Sites and Policies Plan. The Retail Study made brief comment to the population increase at the New Community North of Fareham (NCNF), and this supplementary paper has been prepared to explore further the retail needs arising within the new community.

1.2 Evidence shows that local shops and facilities are an essential component of attractive, viable and sustainable urban extensions and new housing communities. District and local centres with a strong retail offer are vital in terms of fostering sustainability, social inclusion and to support other valued community facilities (such as libraries, health facilities, employment centres, training centres and sports facilities) and it is clear that local shopping facilities will be an important part of the NCNF.

1.3 The presence of an anchor multiple foodstore is often key to developing successful neighbourhood centres, they can bring many benefits and also increase footfall benefiting all operators and helping to support services. This paper sets out the need for this type of operator as part of the NCNF, but it is also important to consider the range of ancillary retail and service uses, which are important components of neighbourhood centres in order that local residents can fulfil their everyday needs.

1.4 To put the NCNF aspirations into context from the outset, policy has historically defined District and Local Centres as follows:

- **District Centres** will usually comprise a group of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants as well as local public facilities such as a library;
- **Local Centres** include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a post office and a pharmacy. Other facilities could include a hot-food take-away and laundrette.

1.5 These definitions provide a useful starting point when considering the scale and mix of retailing that is expected to serve a new self-serving sustainable community. The Council's brief in respect of the NCNF confirms that new retail floorspace is not intended to compete with Fareham Town Centre, but instead to form a self-serving sustainable community with a new 'centre' catering for convenience and local top up shopping and service requirements.

NCNF: Background

1.6 Located to the north of the M27, the NCNF is identified as an area of major residential growth with the potential to deliver a substantial level of new housing over the period to 2036. The site's allocation for major housing growth originates from Policy SH2 of the South East Plan (2009) and has been brought forward through Policy CS13 in the Fareham Core Strategy (adopted August 2011). Policy CS13 states that the NCNF is envisaged to deliver between 6,500-7,500 dwellings (substantially less than the 10,000 requirement set out in the RSS).

1.7 The Council has recently consulted on initial 'Options' for the North of Fareham Area Action Plan (AAP). This early stage document set out four options around the broad scale and location of uses, including the location of a new district centre and three local centres. This supplementary paper has been prepared to inform the next stage of the draft AAP in advance of further consultation on the emerging document. The following sections forecast the extent of qualitative and quantitative need, and provide a broad indication of the type and mix of retail uses supportable.

Shopping Patterns/Performance

1.8 This section enables us to understand the existing network of retail provision within the catchment of the proposed NCNF, and the shopping patterns of those who already live within close proximity to the proposed NCNF. The NCNF is located in Zone 8 of the 2012 Fareham Borough Retail Study Survey Area (Plan 1 attached). Foodstores within and adjoining Fareham Borough are mapped on Plan 2.

1.9 Zone 8 is currently the least populated and most rural of all the survey zones, and incorporates the village centre of Knowle, and Wickham Square District Centre, both of which are in Winchester City Council. Knowle is small in scale providing only a small 'Village Express' top up convenience store. Wickham is larger and evidence suggests the centre performs well with a good range of retail and service facilities and a strong quality of environment underpinned by its historic character and public realm investment. Convenience goods provision is good offering a Co-Op, One Stop shop and an independent butcher. Recent evidence based work has identified limited opportunity for any retail expansion.

1.10 The survey evidence underpinning the Fareham Retail Study (2012) enables us to understand where existing residents in this Zone are travelling for their main and top up food shopping. The outputs are summarised in Tables 1.1 and 1.2 below.

Table 1.1: Zone 8 Shopping Patterns for Top Up Food Shopping

Destination	Market Share Top Up Food (%)
Co-Op, The Square, Wickham/Wickham District Centre	55.0%
Sainsbury's, Broadcut	13.0%
Highlands Road Local Centre	8.7%
Tesco, Quay St, Fareham	7.2%
'Other' Fareham Town Centre	5.8%
TOTAL	**89.7%**

Table 1.2: Zone 8 Shopping Patterns for Main Food Shopping

Destination	Market Share Main Food (%)
Sainsbury's, Broadcut	57.5%
Co-Op, Wickham	8.0%
Asda, Speedfields	6.9%
Tesco Extra, Portsmouth	6.9%
Sainsbury's, Hedge End	3.5%
Tesco, Quay Street, Fareham	3.5%
Asda, Bedhampton	3.5%
TOTAL	**89.65%**

1.11 It is apparent from Table 1.1 that the majority of Zone 8 residents use Wickham District Centre for their top up food shopping, but a fair proportion also use the Sainsbury's at Broadcut, Highlands Local Shopping Centre (Co-Op) and Fareham Town Centre. For main food shopping, the dominant choice is Sainsbury's at Broadcut, followed by a wider range of destinations including the Co-Op in Wickham, but primarily alternative out-of-centre destinations.

1.12 Sainsbury's at Broadcut is not located in Zone 8, but serves a wide catchment, including the rural areas to the north of Fareham where residents are travelling some distance for their main food shopping and also their top up food shopping. This is often characteristic of more rural areas, but illustrates that existing provision in Knowle and Wickham centres would not meet the needs of a new community of the scale being proposed. New residents would be likely to follow existing shopping patterns, dominated primarily by the out-of-centre Sainsbury's at Broadcut, which the 2012 Retail Study has already identified to be substantially over-trading.

NCNF Housing and Population Growth

1.13 We have drawn on the most up-to-date Housing Trajectory provided by Fareham Borough Council to understand likely housing and population growth in the NCNF over the Plan Period. It has been agreed to base our assessment on a 'Mid' and 'High' growth rate scenario, the mid reflecting a modestly improving economy from 2019, and the high reflecting a fast improving economy from 2019. The detailed outputs are summarised below in Table 1.3 and 1.4.

1.14 The Fareham Borough Retail Study (October 2012) forecast over the Plan Period to 2027, but in respect of the NCNF we have based our projections on the period to 2036 to reflect realistic development completions. This has been agreed with the Council.

Table 1.3: NCNF 'Mid' Scenario Housing and Population Forecasts

	2017	2022	2027	2032	2036
Completed No. Dwellings	90	1,110	2,550	4,350	5,530
Population	257	2,965	6,656	11,039	13,462

Table 1.4: NCNF 'High' Scenario Housing and Population Forecasts

	2017	2022	2027	2032	2036
Completed No. Dwellings	100	1,230	3,100	5,200	6,600
Population	286	3,286	8,092	13,195	16,281

NCNF Expenditure Growth

1.15 This section identifies the amount of expenditure likely to be generated by the new population. At this stage it is not possible to identify the exact spending power of the new population in the NCNF. We have therefore drawn upon the average annual expenditure per person across the whole survey area (including parts of neighbouring authorities including Winchester and Gosport). This provides a reasonable and robust basis from which to estimate growth in spending. Experian estimate that the average annual expenditure per person in the survey area is £1,973 (2010 prices) for convenience goods and £3,052 for comparison goods.

1.16 In order to factor in growth in expenditure we have drawn on the economic forecasts published by Experian Business Strategies (Retail Planner 9) which is a conventional and widely used source of economic data on retail spending. Experian expect spending on comparison goods to grow faster than on convenience goods, as the scope to purchase more food is limited. These assumptions take into account current economic circumstances and the effects of the recession, which have had a significant impact on forecast levels of growth expected over the plan period.

1.17 Factoring in expenditure growth[1] and an allowance for Special Forms of Trading (SFT[2]) (i.e. expenditure not spent in shops)[3] we estimate the average per capita spend in 2017 will be £1,888 for convenience goods and £3,120 for comparison goods. By 2036, this is forecast to grow to £2,093 for convenience goods and £5,471 for comparison goods.

1.18 The model applies the estimated expenditure per head figures to the anticipated population in the NCNF over the 5 year intervals between 2017 and 2036, which identifies the overall 'pot' of available expenditure generated by the increasing number of new residents. The result of this analysis, for the 'Mid' and 'High' scenarios, is set out in Tables 1.5 and 1.6 below.

[1] Convenience Goods: -0.3% pa 2010-11; -0.4% pa 2011-12; 0.5% pa 2012-17; 0.6% pa 2017-36.
Comparison Goods: 0.5% pa 2010-11; 1.6% pa 2011-12; 2.8% pa 2012-17; 3.0% pa 2017-36.

[2] Convenience Goods: 6% at 2017; 6.3% at 2022; 6.9% at 2026 and 7% beyond 2026.
Comparison Goods: 12.8% 2017-2036.

[3] Also derived from Experian Retail Planner 9.

Table 1.5: NCNF 'Mid' Scenario Forecast Expenditure Growth

	2017	2022	2027	2032	2036
Convenience Goods (£m)	£0.5m	£5.7m	£13.2m	£22.6m	£28.6m
Comparison Goods (£m)	£0.8m	£10.7m	£27.9m	£53.7m	£74.6m
Total (£000)	**£1.3m**	**£16.4m**	**£41.1m**	**£76.3m**	**£103.2m**

Table 1.6: NCNF 'High' Scenario Forecast Expenditure Growth

	2017	2022	2027	2032	2036
Convenience Goods (£m)	£0.5m	£6.4m	£16.1m	£27.0m	£34.1m
Comparison Goods (£m)	£0.9m	£11.9m	£33.9m	£64.1m	£89.1m
Total (£000)	**£1.4m**	**£18.3m**	**£50.0m**	**£91.1m**	**£123.1m**

1.19 By applying the population to spend per capita it is evident that by 2017 the new resident population at the NCNF will generate less than £1.5m of new retail expenditure. However, by 2027 this is forecast to increase to between £41.1 and £50m; and by 2036, the NCNF will have generated up to £123m in the higher growth scenario, which is reliant on a fast improving economy from 2019.

NCNF Retail Floorspace Capacity

1.20 The next stage of our analysis is to estimate the amount of convenience and comparison good floorspace that would be supported by the expenditure generated. This is determined by the sales density achieved by foodstores and non-food floorspace.

1.21 Adopting a benchmark sales density of £12,000 per sq m (which is a broadly in line with that achieved by large foodstores), and allowing for growth in sales efficiency[4]; the expenditure generated in the NCNF could support between 2,245 - 2,680 sqm net convenience goods floorspace under the 'Mid' and 'High' growth scenario over the period to 2036. To put this figure into context, this is of a similar scale to the Tesco foodstore in Fareham town centre (2,535 sqm net). The projected convenience goods floorspace capacity generated by the NCNF population over the period to 2036 is set out in Table 1.7 below.

[4] 0.4% pa 2012-2017 and 0.2% pa 2017-2036, derived from Experian Retail Planner 9.

Table 1.7: NCNF Convenience Goods Floorspace Capacity (sqm net)

	2017	2022	2027	2032	2036
'Mid' Scenario	40	465	1,058	1,788	2,245
'High' Scenario	44	515	1,286	2,138	2,680

1.22 For comparison goods, we have adopted a benchmark sales density of £5,000 per sqm which is consistent with the approach adopted in the Fareham Retail Study 2012; and like convenience goods we have included an allowance for improvements in sales efficiency[5]. The projected comparison goods floorspace capacity generated by the NCNF population over the period to 2036 is set out in Table 1.8 below.

Table 1.8: NCNF Comparison Goods Floorspace Capacity (sqm net)

	2017	2022	2027	2032	2036
'Mid' Scenario	147	1,806	4,334	7,660	9,960
'High' Scenario	164	2,008	5,270	9,156	11,886

1.23 Consistent with policy definitions, a new centre will likely be anchored by a supermarket and include smaller scale ancillary comparison shops and service operators. The level of convenience goods floorspace identified above is, however, relatively limited in the early phase of the plan period, i.e. only 515 sq m net by 2022 in the high growth scenario. The commercial advice obtained for this assessment, discussed later in this paper, has confirmed that this would not deter a main foodstore operator from anchoring the new community, but it would be reliant on existing catchment expenditure in the earlier phases of the plan period.

1.24 In order to provide a broad overview of the expenditure potential within the existing catchment area of the planned NCNF, we have considered a 2 minute drive time catchment (see attached Plan). This catchment captures 18,125 existing residents; and adopting the same methodology as above, they will generate approximately £37m of convenience goods expenditure by 2022 with the ability to support around 3,000 sq m net of convenience goods floorspace over that period.

[5] 1.7% pa 2012-2036, derived from Experian Retail Planner 9.

Foodstore Operator Demand

1.25 As noted already, this assessment has been supplemented by advice provided by our retail agency team in order to ensure the technical outputs are grounded in commercial reality. We note here that the retail and service uses are likely to form an early phase of NCNF development being key to supporting the new community from the outset.

1.26 The commercial assessment studied the Masterplan Options and Fareham Retail Study (2012), and in the context of extensive experience of catchment areas, as well as food retailers and their requirements, it is concluded that a foodstore operator would require a store of between 2,787 sq m gross (30,000 sq ft) and 3,716 sq m gross (40,000 sq ft) in order to effectively perform the role of an anchor.

1.27 This broadly equates to a net convenience goods floorspace of between 1,900 sq m and 2,500 sq m, and based on a broad sales density of around £12,000 per sq m net would equate to a turnover of between £22.8m and £30m.

Scale of Foodstore Supportable

1.28 Our assessment has demonstrated that an anchor foodstore is likely to form an early phase of NCNF development, but that the emerging NCNF population could only support around 500 sq m net of convenience goods floorspace by 2022 as only 1,230 dwellings would be built. Operator demand would require a store of between 1,900 sq m and 2,500 sq m net convenience in today's market and catchment context, and would therefore need to rely on existing expenditure in the earlier phases of the plan period to 2036 when the development would be nearing completion.

1.29 We have calculated that within a 2 minute drive time, there will be £37m of available convenience goods expenditure by 2022, able to support around 3,000 sq m net of convenience goods floorspace. In the absence of the NCNF, this expenditure will be distributed across existing foodstores, and a new anchor in the NCNF will need to rely on an element of claw-back from these stores. A catchment greater than this would be unrealistic and inappropriate in this context, given the adjoining rural areas and Fareham town centre to the south.

1.30 This paper does not provide a detailed retail impact assessment, but has looked at dominant foodstore destinations within this catchment area and also the performance of these destinations. We conclude that the main impact will fall on the Sainsbury's at

Broadcut; this is the dominant main foodstore destination for those living within the catchment area of the NCNF and is currently over-trading by some £23m. This level of overtrading could theoretically support around 1,900 sq m net of new floorspace if diverted elsewhere, i.e. to the NCNF.

1.31 It is evident from this analysis that there is surplus expenditure in the system to support a new foodstore anchor in the NCNF. It is unlikely, however, that a new foodstore in the NCNF will capture the full extent of trade within the 2 minute catchment area, or will divert the full extent of overtrading from the Sainsbury's foodstore at Broadcut. It is our view, taking all factors into consideration, that a foodstore with a convenience goods floorspace of around 1,900 sq m net (2,787 sq m gross / 30,000 sq ft gross) could be comfortably supported within the NCNF catchment area in advance of the full extent of housing coming forwards by 2036. We set out our reasons below.

1.32 The existing population in Zone 8 and in the proposed NCNF by 2022 (and even by 2036) is substantially smaller than most other parts of the Fareham catchment area. A foodstore any larger would need to attract shoppers from a much wider catchment area, contrary to the self-contained/sustainable community objectives of the NCNF. This would firstly be difficult to achieve given the large areas of adjoining rural land with a low population.

1.33 A larger store and a larger catchment would be likely to start having a greater impact on Fareham town centre, particularly when considered cumulatively with other foodstores planned in Fareham over the plan period (detailed in the Fareham Retail Study). The Sainsbury's at Broadcut, for example, has a net convenience goods floorspace of 3,331 sq m and draws a significant proportion of trade from every survey zone. As we have noted, a new foodstore should primarily serve the NCNF, and whilst it is reasonable to assume that it will draw some trade from the existing catchment population, the intention is not to provide a new food superstore to compete at the same level with Sainsbury's Broadcut, for example.

1.34 We do not consider that a new foodstore at the NCNF would have any impact on Knowle Village Centre in terms of purely retail issues. Knowle has only a small top up/CTN (confectionary, tobacconist, newsagents) store and existing residents are already travelling further afield for their main food shopping. The CTN will be very unlikely to close given its role as an everyday top up shop for residents relatively cut off from alternative destinations. We consider there is an opportunity to enhance shopping facilities at Knowle if the physical opportunity allows.

1.35 Wickham District Centre does have a stronger retail provision but continues to cater for primarily top up food shopping. The evidence collated by Winchester City Council demonstrates that the centre is performing well, underpinned by the quality of the environment and good retail and service mix and adjoining parking. There were no vacant units when we undertook our site visit. It is our view that local residents will continue to visit Wickham for their everyday requirements, but would stop travelling to the major out-of-centre foodstores for their main food shopping, using the closer NCNF foodstore instead.

1.36 A new foodstore as part of the NCNF will cater for both top up and main food shopping trips and given its scale will be supported by the new community and also those currently travelling to the Sainsbury's store at Broadcut, Asda at Speedfields, Tesco Extra in Portsmouth and Sainsbury's at Hedge End. The out-of-centre foodstores are all over-trading and, although not a material planning consideration, could sustain such trade diversion.

Ancillary Uses/Job Creation

1.37 This section broadly sets out the appropriate scale of ancillary facilities alongside a new anchor foodstore as part of the NCNF, including comparison retailers, community uses, service operators and car parking provision. We also comment on the extent of job creation arising from the mix and scale being recommended.

Comparison/Service Uses

1.38 Our quantitative technical analysis indicates potential for the new community to generate sufficient expenditure to support between 1,806 sq m and 2,008 sq m net of comparison goods floorspace by 2022, rising to 9,960 sq m to 11,886 sq m net by 2036. A proportion of this trade will be directed to higher order centres, such as Fareham town centre and the new shopping destination at Whiteley for clothing/footwear type shopping, but the expenditure and floorspace forecasts do demonstrate the ability of the NCNF to provide a good selection of comparison and service retailers consistent with the definitions of a District Centre set out at the beginning of this paper.

1.39 Retailers and service operators that would be appropriate in a District Centre might include the following:

- Pharmacy
- Hairdresser
- Florist
- Post Office
- CTN retailer
- Bank
- Take-Away
- Travel Agent
- Estate Agent
- Restaurant/Café
- Opticians
- Beauty Salon
- Hardware Store
- Card/Gift Shop
- Dry Cleaners
- Laundrette
- Independent foodstore
- Dentist

1.40 It is difficult to be concise at this stage about the number of comparison units considered to be deliverable and viable. In technical planning terms, each of those described above would require a unit size of around 200 sq m net equating to a total floorspace of 3,600 sq m net. We consider the mix of operators and required floorspace would be supportable as part of the NCNF both in sustainability terms and available expenditure. As plans emerge, more or less units might be incorporated into a scheme, and whilst our broadbrush assessment would not necessarily recommend against this, we do advise ensuring an appropriate policy framework to ensure consistency with the type of operator listed above.

1.41 A test case example of a similar 'new' centre is Southwater in Horsham District Council, Sussex. This centre, which opened in 2006, is a huge success serving a new community and has 19 units in total occupied by one convenience retailer (Co-Op), seven comparison goods retailers, and eleven service operators. The centre has a weekly market every Friday between 4pm and 9pm which sells a range of fresh local produce including bread, fruit and vegetables and cakes. Some specialist retailers operate in Southwater, including two cycle shops and a bespoke model toy shop. There is a Boots pharmacy, a florist, gift shop and a pet shop. There is also commercial office floorspace which accommodates the Community Police and Parish Council offices amongst other private businesses.

1.42 Whilst one or two niche footwear/clothing units might be appropriate, the NCNF should not provide substantial offer in these categories which are not consistent with a District Centre definition. As set out in paragraph 1.4, District Centres should usually comprise a small group of shops, and in this case the new centre would sit alongside other district centres in the borough's retail hierarchy (Locks Heath and Portchester) and the intention would not be to compete with Fareham town centre. The new centre should serve local 'everyday' requirements, and emerging proposals should be supported by detailed retail impact assessments.

Community/Leisure Uses

1.43 New district and local centres generally provide a range of other community and leisure uses to meet the wider requirements of a new catchment population. These can include primary schools, children's centres, crèche/nursery facilities, fitness/health centre, community hall for general community use and youth club activities, outdoor playing fields/sports club facilities and social clubs.

1.44 Repton Park in Ashford is a new centre comprising 1,250 new homes and flats, anchored by a Waitrose foodstore, but also providing a new primary school, Virgin Active leisure centre, and community hall facility. Based on the substantially higher number of houses planned for the NCNF, we consider the new community could support a strong range of community and leisure uses, but ultimately this will be dependent on market demand.

Car Parking

1.45 The Core Strategy sets out the policy framework for 'Access and Movement' within the new community, and in terms of car parking states:

> *"A car parking strategy will be developed, which will provide the basis for managing car demand at the home, workplace and district centre. Radical and attractive alternatives to car ownership will be developed including car sharing, and car clubs. The parking strategy will ensure that places and spaces are not unduly dominated by parked cars. The strategy will need to balance the need to restrain the use of the private car with the need to ensure that the new district centre is vibrant and commercially viable." (paragraph 5.113)*

1.46 In terms of parking provision, the anchor foodstore operator will have a particular requirement in terms of the number and location of parking provision. Based on GVA's commercial experience working alongside the main foodstore operators, a store comprising 30,000 sq ft gross (2,787 sq m gross) would require c.350 parking spaces.

1.47 These spaces will be required by the foodstore alone and only if the operator is in control of the wider centre will they be willing to share spaces with other uses in the centre. The parking requirement for the wider district centre will ultimately depend upon the nature and scale of other uses, including residential, community buildings and health centres, for example. The Local Plan (2000) adopts maximum parking standards, but if the maximum threshold was applied to the District Centre for each land use, it might be car dominated to the detriment of the quality of place/space.

1.48 Similarly, given the primary purpose of the Centre is to serve a local need and the emphasis on development is the creation of a sustainable community, the application of maximum standards would likely be inappropriate.

1.49 To some degree, the level of parking will also depend upon the extent to which the Council is able to implement 'smarter choices' to help influence people's travel behaviour towards more sustainable options. Such measures could include:

- Marketing sustainable travel options;
- Providing services which are targeted on a particular market; and
- Providing new options which reduce the need to travel at all.

1.50 The extent to which the new district and local centres can be integrated into the new residential community and are accessible by a range of sustainable transport modes will help to support more sustainable travel and, in turn, reduce the need for extensive parking provision. The car parking strategy must strike a balance between market demand, the objectives of sustainable place-making within the District Centre and the adopted parking standards.

1.51 The Local Centres, discussed below, would be substantially smaller, serving a primarily 'walk in' catchment area. There are no national guidelines on such parking provision, and the adopted Local Plan sets a maximum parking standard of 1 parking space per 20 sq m for general retail stores and shops. In this context, a small newsagent type store would be c.50-100 sq m gross, requiring 3-5 parking spaces. This would seem consistent with the role and purpose of a Local Centre.

Job Creation

1.52 We provide a broad overview of likely job creation arising from the District Centre at the NCNF. Table 1.9 below presents the employment densities associated with retail uses published within the HCA Guide. This provides an indicative figure for the purposes of planning at the strategic level and is the most appropriate terms of reference for this piece of work.

Table 1.9 Employment Densities of Selected Town Centre Uses

Use	Employment Density
A1 High Street	1 employee per 19 sqm NIA
A1 Foodstores	1 employee per 17 sqm NIA
A2 Financial & Professional Services	1 employee per 90 sqm NIA
A3 Restaurants & Cafes	1 employee per 18 sqm NIA

Source: Employment Densities Guide (2nd Edition), 2010

1.53 The study highlights that national retailers have emphasised that employment densities within the retail use class are dependent more on turnover than on floor area. This means a retail unit in a good location with high visibility and a high foot fall is likely to have a higher employment density than a retail unit of the same size in a poor location and/or with a low turnover. Neverthless, the densities set out provide a good indication of job creation levels as a more refined scheme emerges; in very broad terms we estimate the NCNF will support around 250-350 new jobs.

1.54 Again, the Local Centres would be substantially smaller comprising perhaps just one small newsagent/convenience store, creating around 2-4 new jobs.

Local Centres

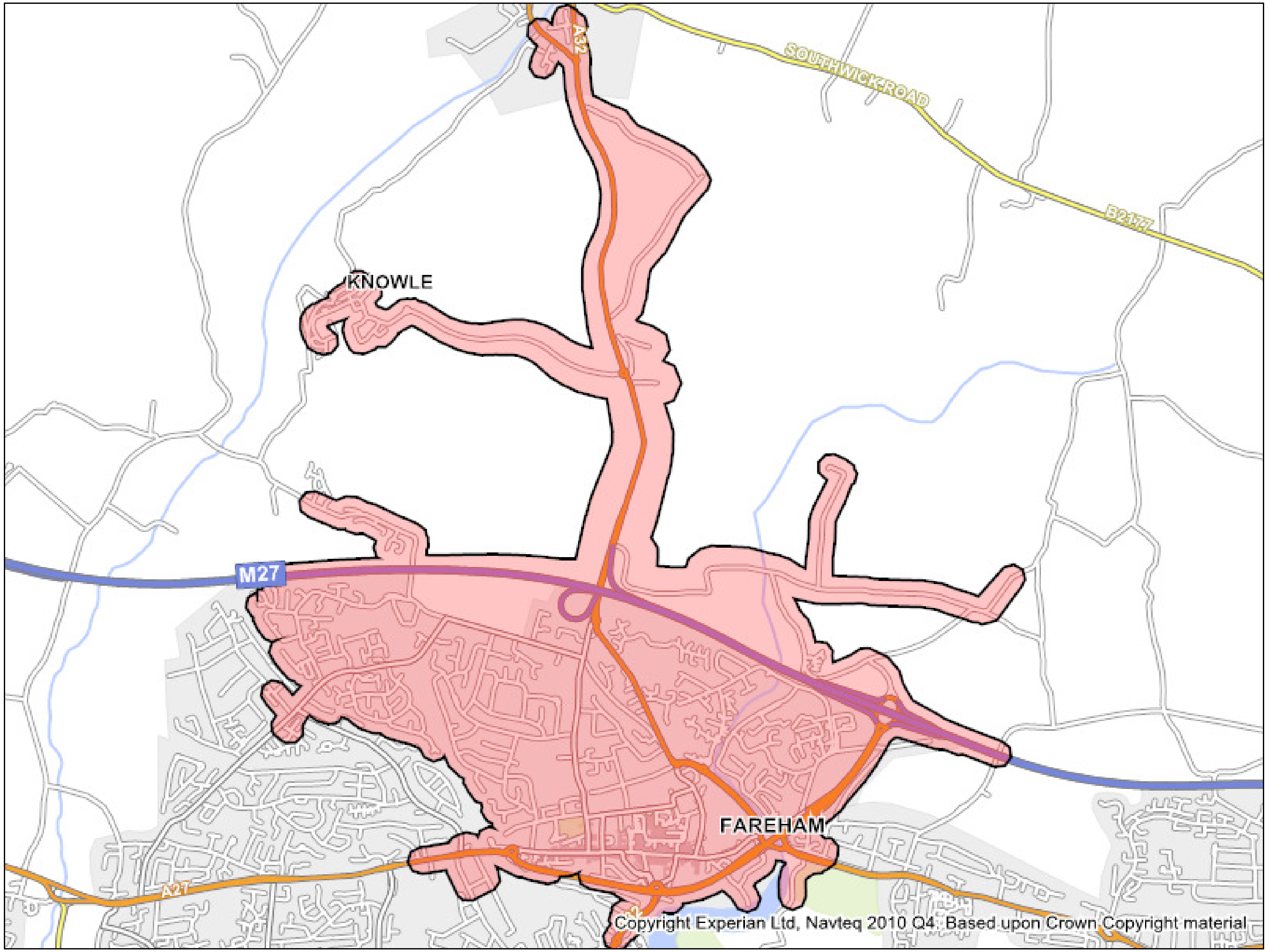
1.55 The early stage NCNF consultation document proposed one District Centre and three Local Centres. Plan 3 (attached) illustrates the boundary of the NCNF, and location of a proposed District Centre, three Local Centres and respective 300metre walk in radius distances. The Plan illustrates the geographical coverage of the NCNF and that no 300 metre radius would be overlapping. In this context we consider that three Local Centres might be appropriate, but would only form a CTN type offer to enable people to walk to collect very basic top up type provision – milk, butter, newspapers, sugar, for example.

1.56 At this stage, the exact levels and location/layout of housing remains uncertain, and it is therefore not possible to provide firm conclusions on the number of new Local Centres needed. In broad terms, it is generally accepted that an appropriate or 'easy' walking distance to top up goods, such as milk, bread, newspapers, is around 300m. The Council should take this into account as the Masterplan evolves to plan for sufficient Local Centres to ensure sustainable communities and accessibility to basic and everyday needs.

Conclusions

- Our assessment has demonstrated the lengthy build out rate of new housing forming the NCNF and the relatively rural catchment area around the NCNF. Nevertheless, there is a substantial leakage of trade from the NCNF core catchment and we consider the Council should plan for a foodstore of around 2,787 sq m gross (1,900 sq m net convenience).
- In terms of ancillary uses, we have listed 18 types of retail and service operator which would be consistent with those uses forming a District Centre definition. These could be supported in sustainability and expenditure terms, and we have not set a cap on number of units but do recommend a clear policy framework on acceptable goods types.
- In broad terms a foodstore of the type recommended would require parking for around 350 vehicles, and the District Centre as a whole might generate 250-350 new jobs. Parking should be considered within the wider strategy and full extent of land use requirements.
- At this stage, and based on the draft Masterplan Options, we conclude that the NCNF could support, in planning terms, three small scale Local Centres for basic everyday essentials in close walking distance from their home. As the Masterplan evolves, in broad terms, an 'easy' walking distance is deemed to be around 300m.

NCNF Two Minute Drive Time Catchment



Note: Drive time calculated from location of District Centre as identified in AAP Options Report (July 2012)