

NORTHAMPTON FOODSTORES CUMULATIVE IMPACT STUDY REPORT

INTRODUCTION

1. West Northamptonshire Development Corporation (WNDC) has received a number of planning applications for new food/non-food stores and extensions to existing food/non-food superstores in Northampton. Three proposed new foodstores or foodstore extensions in the town have also recently become commitments. Whilst some applicants have submitted limited information on potential cumulative retail impacts if more than one application was permitted, none has submitted a comprehensive cumulative impact assessment of all the proposals, including the committed developments.
2. In addition to lacking adequate cumulative impact assessments, the retail assessments submitted by the various applicants were all on different bases with respect to forecasting methods and input data. This was partly because until February 2011, there was no up-to-date and reliable retail study of Northampton to form part of the evidence base for the emerging development plan, which could be used as a common source of up-to-date retail planning data by applicants. However, the West Northamptonshire Retail Study Update (WNRSU) was completed by Roger Tym and Partners (RTP) for the West Northamptonshire Joint Planning Unit (JPU) and published in February 2011. This now provides such base data.
3. In order to obtain a comprehensive and independent overview therefore, WNDC instructed AECOM to undertake such a cumulative impact study. This was to be based as far as possible on the WNRSU, and compatible with it. The retail developments in Northampton to be considered were as follows:

Committed developments:

- Tesco Metro, Abingdon Road, Northampton Town Centre
- Aldi discount supermarket, Wellingborough Road
- Extension of Netto discount supermarket at Far Cotton

Proposed developments:

- Extension of Sainsburys superstore, at Weedon Road, Sixfields
- New food superstore at Nene Valley Retail Park, replacing some existing retail warehouses
- Extension of Tesco superstore at Mere Way
- New superstore in the former Royal Mail sorting office building at Barrack Road
- New Waitrose supermarket replacing the Wyevale Garden Centre at Newport Pagnell Road

4. We have now completed our cumulative impact assessment, and set out our findings and conclusions in this report. In doing so, we distinguish between the cumulative impacts of the proposed convenience goods floorspace and the proposed comparison goods floorspace. Our analysis is based as closely as possible on the source data in the WNRSU, as described below. That report forecast in some detail the capacity for

additional convenience and comparison goods retail floorspace in Northampton over the period to 2026. We have therefore undertaken our cumulative impact study within that context of future consumer expenditure capacity, as required by PPS4 Policy EC16.1.d; and comment only briefly on retail capacity in Northampton and the implications for the committed and proposed developments.

5. After this introduction, we describe our forecasting method, and the data and assumptions on which our forecasts are based. This is followed by brief comments on the retail capacity forecasts in the WNRSU. We then describe and discuss our cumulative impact forecasts. The report ends with our conclusions and recommendations. Appendix 1 includes supplementary information provided by RTP at our request, which amplifies the data in the WNRSU. Appendix 2 is our revised version of Table 3 in Appendix 1. Appendix 3 provides full details of our Cumulative Retail Impact Model for Northampton.

BASIS OF THE RETAIL IMPACT FORECASTS

Catchment Area

6. We have adopted the West Northamptonshire Catchment Area of 11 survey zones used by RTP and shown on Figure 4.1 in Volume 1 of the WNRSU. However, we have also allowed for inflow of comparison goods expenditure from outside this area, as advised by RTP. We describe this further below.

Design Year

7. If granted planning permission within the next few months, all of the committed and proposed developments could potentially be completed by the end of 2012. We have therefore adopted a design year of 2014 for impact testing, in accordance with the definition in Appendix A of the PPS4 Practice Guidance. Since all of the applications for the committed and proposed developments apart from the proposed Waitrose (for which no application has yet been submitted) were made in 2009 or 2010, use of 2014 as a design year also complies with the requirements of PPS4 Policy EC16.1.d; which refers to 'up to five years from the time the application is made' (our emphasis).

Catchment Population

8. We have applied the population forecasts for each catchment zone set out in Volume 3, Appendix 1, Table 1 of the WNRSU. These are at 2008, 2010, 2016, 2021 and 2026. We therefore interpolated between the forecasts for 2010 and 2016, to obtain population forecasts for the design year of 2014. The resulting estimates for the base year of 2010 and the design year of 2014 are set out in Table 1 in our Appendix 3.

Price Basis

9. Unless otherwise stated, all monetary values in this report and Appendices are in **2008 prices**, for compatibility with the 2008 prices used in the WNRSU (as confirmed to us by the JPU).

Per Capita Expenditure

10. We adopted the 2010 per capita expenditure estimates, and the average annual growth rates for growth over the period 2010 to 2016, set out in Tables 2a and 2b in Volume 3, Appendix 1 of the WNRSU. These growth rates were applied for the period 2010 to 2014 in our forecasts. We also adopted the deductions for Special Forms of Trading in Tables 3a and 3b in that Appendix. However for the design year of 2014, we interpolated between the WNRSU estimates for 2010 and 2016. The resulting per capita expenditure estimates and forecasts are set out in Table 2 in our Appendix 3.

Total Expenditure

11. Table 3 in our Appendix 3 is the product of Tables 1 and 2, and sets out the total available expenditure in each catchment zone on convenience and comparison goods, at the base and design years.

Sales in the committed and proposed developments

12. In order to forecast cumulative retail impacts, it is necessary to estimate the likely sales in each committed and proposed development at the design year. In Table 4 in our Appendix 3, we indicate the net sales area of each development, the division between convenience and comparison goods, the 'benchmark' company average convenience and comparison goods sales densities, and the forecast sales at the design year, if each store is trading at its respective 'benchmark' level. We have allowed for the 'benchmark' sales densities to increase at the floorspace efficiency growth rates assumed in the WNRSU. In the subsequent impact tables for each scenario, we have allowed for the various developments to impact upon each other, thus reducing their sales below the 'benchmark' levels in Table 4.
13. No retailers have yet publicly committed to operating the proposed new superstores at Nene Valley Retail Park and Barrack Road. We have therefore assessed these as 'generic' food/non-food superstores, trading at realistic 'benchmark' sales densities for such stores.

Market Shares of existing stores and centres

14. We have based our forecast of the pre-impact sales in each existing store, on the market shares of catchment area expenditure calculated by RTP from the results of their household interview survey of shopping patterns

FINAL

in the catchment area. For convenience goods, these market shares are set out in Table 5 in our Appendix 3. For comparison goods, they are shown in Table 16. The latter is much simpler, as the data in the WNRSU is not sufficiently disaggregated to allow for forecasting comparison goods sales in individual stores, as is possible for convenience goods. It is also not necessary to do so, because the comparison goods impacts would be much less than those for convenience goods. The comparison goods analysis therefore forecasts impacts on Northampton Town Centre, Kingsthorpe District Centre, Weston Favell District Centre, and the out-of-centre retail parks and superstores in Northampton as a group (rather than as individual retail parks and superstores).

Base and Design Year Sales

15. For convenience goods, Table 6 in our Appendix 3 shows the estimated actual expenditure attracted by each store and centre from each catchment zone, and the total sales in each store and centre, at the base year of 2010. This table is the product of Tables 3 and 5. Table 7 shows the forecast actual sales at the design year of 2014, and is also the product of Tables 3 and 5. The final column of Table 7 shows the forecast pre-impact convenience goods sales in each store and centre. It has been used as the starting point for the analysis of cumulative impact in the subsequent tables.
16. For comparison goods, the equivalent tables are Tables 19 and 20. Table 19 is the product of Table 3 and Table 18, and shows the estimated actual comparison goods sales at the base year of 2010. Table 20 is also the product of Tables 3 and 18, and shows the forecast pre-impact sales in each location at the design year of 2014.
17. Tables 19 and 20 allow for inflow of comparison goods expenditure from outside the 11 zone catchment area. The total inflows were taken from Table 7a, Volume 3, Appendix 1 of the WNRSU. That table did not disaggregate the inflow between Northampton Town Centre and other locations in Northampton; and the further information provided by RTP in our Appendix 1 also does not provide such a disaggregation. We have therefore apportioned the inflow indicated by the WNRSU between the town centre, Weston Favell District Centre, and the out-of-centre retail parks and superstores. There is little evidence upon which to base this apportionment, which is therefore our professional judgement. However, the cumulative impact forecasts for comparison goods are not very sensitive to minor changes in the apportionment.

Impact Scenarios

18. We have tested 9 scenarios for retail impact. Scenario 1 is the 'baseline' scenario, which assumes no new developments, and continuation to 2014 of the shopping pattern of market shares indicated by the results of RTP's household interview survey. For convenience goods, this is shown in Table 8; which compares the forecast actual sales in 2014 with 'benchmark' sales, and shows the degree to which each store is forecast to

FINAL

be trading above or below its 'benchmark' level. Scenario 2 assumes that all three committed developments will be implemented, and will divert trade from existing stores and centres, as indicated in Table 9. Because of their small scale, locations, and particular natures, we consider it unlikely that these three developments would impact significantly upon each other, so have not allowed for any such impacts in Scenario 2.

19. In each subsequent scenario up to Scenario 7, we add one more of the proposed developments, in the order in which they are listed in paragraph 3 above. Thus Scenario 3 is the committed developments plus the proposed Sainsburys superstore extension at Sixfields; Scenario 4 is Scenario 3 plus the proposed Nene Valley Retail Park superstore; Scenario 5 is Scenario 4 plus the proposed Tesco superstore extension; and so on up to Scenario 7, which assumes that all the committed and proposed developments are built.
20. There is no particular significance in the order in which additional developments are added to form later scenarios. The purpose of the analysis is to explore how cumulative impact builds up as more developments are added. This provides a spectrum of impacts from zero (Scenario 1) to maximum (Scenario 7), from which intermediate levels of impact due to different combinations of stores can be interpolated. With three committed and five proposed developments, the number of possible combinations of stores and impacts would be far too high for them all to be assessed individually.
21. We have also run Scenarios 8 and 9. Scenario 8 assumes that in addition to the committed developments, only the proposed extension of the Tesco superstore at Mere Way would be built. This scenario is therefore on an identical basis to Scenario 3 for the proposed Sainsburys superstore extension; and enables the impacts of the proposed Sainsburys and Tesco superstore extensions to be compared. Scenario 9 assumes that (in addition to the committed developments) only the proposed extensions to the Sainsburys and Tesco superstores at Sixfields and Mere Way respectively are developed. It assumes that both extensions would trade at their respective company average 'benchmark' level, without impact upon each other (although with impact upon the existing superstores). In practice, there would be some competition between these two superstore extensions, with the result that they may not both reach their 'benchmark' levels of trade. Scenario 8 therefore probably represents the worst case impacts if both of these proposed developments were to occur.
22. For convenience goods, the impact tables for Scenarios 1 to 9 are Tables 8 to 16 respectively in our Appendix 3. The results are summarised in Table 17. That table also compares the post-impact sales in Scenarios 7 and 9 with the 'benchmark' sales in Table 4, and shows the degree to which each store and centre would be trading above or below its 'benchmark' level after suffering the cumulative impacts of Scenarios 7 and 9.
23. The same method has been used for comparison goods. The impact tables for Scenarios 1 to 9 are Tables 21 to 28. The results are summarised in Table 29. As a reference point, this table shows the degree to which each location would be trading above the estimated 2010 level, following completion of the committed

FINAL

developments (Scenario 2). It also shows in the final two columns the degree to which each location would be trading above the estimated 2010 level, after suffering the cumulative impacts from all eight committed and proposed developments in Scenario 7, and the two proposed superstore extensions (plus the committed developments) in Scenario 9.

Trade draws to new developments

24. In Tables 9 to 16 for convenience goods, and Tables 21 to 28 for comparison goods, we set out our assessments of the trade draw pattern of each committed and proposed development. These trade draws represent trade diverted from existing stores and centres, which is also shown in those tables. Each table shows the incremental impacts on the sales levels in the preceding scenario, and the cumulative impact on the forecast pre-impact sales in Scenario 1.
25. The trade draws are our professional judgements about the source of trade in each committed and proposed development. They take account of the scale and nature of each development and its likely operator. As indicated above, for the proposed new superstores at Nene Valley Retail Park and at Barrack Road, the retail operators are not yet certain. We have therefore assessed these as 'generic' food/non-food superstores, trading at realistic levels for such stores. However, the trade draw patterns would be likely to vary between different operators, as a result of brand loyalty by customers and the locational relationship between the retailers' existing and new stores.
26. There is also a particular issue if Asda was to operate one or both of these proposed new superstores. Asda currently operates only a large supermarket in Northampton, at Kingsthorpe District Centre (apart from the two Netto discount stores which it acquired when it bought that company recently). If Asda was the operator of a new superstore at Barrack Road, for example, it would be more likely that it would close its existing supermarket at Kingsthorpe District Centre, than if another retailer operated that new superstore. In such a case, the impact on Kingsthorpe would be greater than we have estimated for a 'generic' superstore at Barrack Road. Our trade draw estimates for the 'generic' new superstores are therefore necessarily somewhat broad.
27. The impact tables in Scenarios 3 to 7 allow for the impact of each additional development upon those added in the previous scenarios. They therefore show how each would be likely to impact upon the others. They also allow for trade diversion from locations other than those listed, i.e. those designated as 'elsewhere' in the tables. In the case of comparison goods, this category includes local shops in Northampton as well as stores and centres outside the town. Allocating some of the trade draw to such locations effectively allows for small increases in the market shares of catchment area expenditure attracted by stores and centres in Northampton, as a result of the new developments. However Table 5 in our Appendix 3 shows that the potential for increased market shares of convenience goods expenditure (in particular) in the town itself is

very limited; as there is very little leakage of convenience goods expenditure from catchment zones 4, 5, 6 and 7 which together form the town.

CAPACITY FOR NEW CONVENIENCE GOODS FLOOSPACE

28. The WNRSU forecasts capacity for new convenience and comparison goods retail floorspace in Northampton Borough as a whole. In the case of convenience goods, Table 12a in Volume 3, Appendix 1 indicates capacity of 4,435 sq m net in the base year of 2010, rising in subsequent years. This is predicated on the existence of an 'initial surplus' expenditure of £55.65m in 2010, i.e. overtrading of existing stores above 'benchmark' levels, which rises in subsequent years. The 'benchmarking' calculation by RTP from which the initial surplus of £55.65m was derived is set out Table 3 in our Appendix 1. However, we consider that this under-estimates 'benchmark' sales in the existing major stores, and hence over-estimates the 'surplus'. As a result, we consider that the expenditure capacity for new convenience goods floorspace in the base year and subsequent years has been somewhat over-estimated in the WNRSU.
29. In our Appendix 2, we set out our revised version of RTP's Table 3 in our Appendix 1. The first main difference is that RTP have substantially under-estimated the convenience goods floorspace in the Asda supermarket at Kingsthorpe. They have applied an approximate company average space allocation for convenience goods of 60% to this store, which is well below the average size of the company's stores. We estimate that about 90% of the net sales area of this store is used for convenience goods, leading to substantially greater net convenience goods sales than RTP has assumed.
30. Second, RTP has substantially under-estimated Morrisons' convenience goods sales density. They have assumed only £11,867 per sq m net; whereas based on the latest information published by Verdict Research Limited in 2010, we estimate that it is now about £16,188 per sq m net. This means that RTP has substantially underestimated the 'benchmark' sales in the two Morrisons superstores.
31. Third, RTP has significantly under-estimated the convenience goods sales densities in the two existing Sainsburys stores. They have assumed a sales density of £10,372 per sq m net; whereas based on the latest information published by Verdict Research Limited in 2010, we estimate that it is now about £12,288 per sq m net. Again, this underestimates the 'benchmark' sales in these stores, and leads to over-estimation of 'surplus' expenditure and retail capacity.
32. There are a number of other differences between RTP's Table 3 and our revised version. Some of these compensate for the above differences to some degree. However, the net effect is that we estimate that the 'surplus' in 2010 due to the major stores trading at above 'benchmark' levels was actually about £36.27m,

rather than £55.65m as estimated by RTP. Applying the 'generic' turnover of £12,546 per sq m net for new floorspace assumed by RTP, results in a capacity estimate of 2,890 sq m net in 2010.

33. Some of this estimated base year capacity will be absorbed by the committed developments, which were not taken into account in the WNRSU. Based on the net sales areas and sales densities in Table 4 in our Appendix 3, we estimate that if they had been open in 2010, these would account for about £14.76m of convenience goods expenditure. After allowing for the committed developments therefore, the 'surplus' convenience goods expenditure in the base year of 2010 would be about £21.51m. At RTP's assumed sales density for new floorspace of £12,546 per sq m net, this indicates base year capacity post commitments for new convenience goods floorspace of about 1,715 sq m net.
34. This is not sufficient to support a new superstore, which typically would have a convenience goods sales area of not less than about 3,000 sq m net. Of course, growth in convenience goods expenditure in future years would result in increased capacity for new floorspace. However the foregoing brief review of the WNRSU convenience goods forecasts indicates that the capacity for new convenience goods floorspace is likely to be somewhat less than the WNRSU indicates. In these circumstances, the individual and cumulative impacts of the committed and proposed new developments, particularly the latter, will be greater than could be inferred from the WNRSU.

CUMULATIVE RETAIL IMPACTS

Convenience Goods

35. Before describing the results of our cumulative impact analysis, some observations on the trading performance of the existing stores and centres are necessary. Table 8 in our Appendix 3 indicates each store's forecast 'benchmark' sales in 2014, and compares this with the forecast actual sales. The final column shows the degree to which each store is forecast to be trading above or below the 'benchmark' level. Particularly notable in Table 8 is the following:
 1. Of the existing superstores, Sainsburys at Sixfields, Morrisons at Kettering Road, and Tesco at Mere Way are trading at substantially above their 'benchmark' levels; particularly Morrisons, which is trading far above (but see the comment on Morrisons at Victoria Parade below).
 2. Aldi at St James End and Lidl at Weston Favell are both trading at far above their 'benchmark' levels. However, this overtrading is likely to be reduced by the committed new Aldi at Wellingborough Road, and extension to Netto at Far Cotton.

FINAL

3. Morrisons at Victoria Parade is the worst performing superstore in the town, and is estimated to be trading at substantially below its 'benchmark' level. However the WNRSU comments that the balance between the two Morrisons superstores may not actually be as unfavourable to this store as appears from the results of the household interview survey; as some respondents who actually use the Victoria Parade store may have indicated the Kettering Road store in error. The Victoria Parade store may not therefore be trading as badly as Table 8 shows (or the Kettering Road store trading as well). Nevertheless, there is little doubt that Morrisons at Victoria Parade is the weakest superstore in the town. It also happens to be the one which would be likely to suffer the greatest cumulative impacts, as described below.
 4. The town centre stores are shown in Table 8 to be substantially under-trading, particularly Marks & Spencer. This is unlikely – as small sample household interview surveys of this type tend to under-represent use of town centre 'basket trade' and top-up foodstores, and smaller stores; and over-represent use of large superstores. The WNRSU did not make any market shares corrections to allow for this phenomenon, and we have therefore had to rely on the market shares which it indicates. However, it means that the town centre is probably not performing as badly as indicated in Table 8, or the superstores performing quite as well. This needs to be borne in mind, when interpreting the cumulative impact forecasts.
 5. Tesco Extra at Weston Favell District Centre is shown in Table 8 as marginally under-performing, as is Waitrose at Kingsthorpe District Centre. Conversely, Asda at Kingsthorpe District Centre is shown as performing substantially above its 'benchmark' level. The Co-op store at Barry Road is shown as substantially under-performing. However, as a small local supermarket, it is actually likely to be performing somewhat better than indicated by the results of the household interview survey.
36. Our convenience goods retail impact forecasts are set out in Tables 9 (Scenario 2) to 16 (Scenario 9) in our Appendix 3. These show how cumulative impact builds up as additional developments are added. The increasing impacts are summarised in Table 17. The most important findings in Table 17 are as follows:
- a) The committed developments would have largely insignificant impacts. Whilst the committed Aldi at Wellingborough Road would have a substantial impact on the existing Aldi at St James End, and on Lidl at Weston Favell, these two stores are currently trading at substantially above their respective 'benchmark' levels (particularly Aldi). The Tesco Metro in Northampton Town Centre would impact somewhat on Sainsburys and Marks & Spencer in the town centre, but overall would result in a significant increase in town centre convenience goods sales.
 - b) The greatest increases in impact would arise from the proposed new superstores at Nene Valley Retail Park and Barrack Road. This is not surprising, as these would result in substantially the largest

FINAL

increases in convenience goods floorspace and sales. Table 4 shows that each would have convenience goods sales of around four times that of the proposed Sainsburys superstore extension, more than five times that of the proposed Tesco superstore extension, and around three and a half times that of the proposed Waitrose supermarket. In comparison with the impacts from these proposed new superstores, the convenience goods impacts from the proposed extensions to the Sainsburys and Tesco superstores, and from the proposed Waitrose supermarket would be relatively modest. Even if all three of the latter developments were permitted, their combined convenience goods impacts would be less than that of one of the two proposed new superstores.

- c) Morrisons at Victoria Parade would suffer by far the greatest cumulative impact on its convenience goods sales. The cumulative impact if all the developments occurred (Scenario 7) would be about 60%. Bearing in mind that this store is estimated to be significantly under-trading even in the base year of 2010, after suffering the cumulative impacts it would be likely to be trading at only about 31% of its 'benchmark' level, based on the results of the WNRSU household interview survey. We consider that it is unlikely that it could continue to trade at this very low level, and may well be forced to close. Even if as commented upon above, its base year sales were underestimated by the WNRSU, it would still be trading at far below its 'benchmark' level, after suffering the cumulative impacts we expect. It is therefore the most vulnerable to closure of all the stores considered. It is not a particularly well-located store, being somewhat distant from the principal residential areas, and on the town centre ring road.
- d) The second highest cumulative impact (50%) would be suffered by Aldi at St James End. However, an impact of just over 40% would be due to the committed new Aldi at Wellingborough Road. The existing Aldi is currently substantially over trading; and even after suffering the high cumulative impact, it would still be trading moderately above its 'benchmark' level, so would not close.
- e) The third highest cumulative impact (45%) would be suffered by the Asda supermarket at Kingsthorpe District Centre. This is not surprising as it is too large to act as a local convenience store, but too small to carry the range of goods which would enable it to compete equally with the superstores. Whilst at present it is trading well, at above its 'benchmark' level (being the only Asda store in Northampton), it would be vulnerable to much increased competition from enlarged superstores and new superstores. After suffering the forecast cumulative impacts of Scenario 7, its convenience goods sales would be likely to drop to about 68% of 'benchmark' level. Whilst it should be possible for it to continue trading at that level, it is not unlikely that Asda would choose to close it if the company was able to occupy a new superstore at either Nene Valley Retail Park or Barrack Road. In such circumstances, the impact on Kingsthorpe District Centre as a whole would be much greater than the Scenario 7 average of 38% indicated in Table 17. If Asda closed, we would expect the impact on the district centre as a whole to be amplified through loss of linked trips – although the degree of this could depend on how the existing building was re-used.

FINAL

- f) The next highest cumulative impacts would be suffered by Co-op at Barry Road, Lidl at Weston Favell, and the 'other foodstores in Zone 7' (including the existing Netto at Far Cotton). These would suffer cumulative impacts of about 38% to 40% in Scenario 7. However, Lidl is currently substantially overtrading. Much of the impact upon it would be due to the committed new Aldi at Wellingborough Road and the committed extension to Netto at Far Cotton. Even after suffering the cumulative impacts, Lidl would still be trading at slightly above its 'benchmark' level. The impact on the 'other foodstores in Zone 7' including the existing Netto would be somewhat mitigated by the committed extension of Netto. Whilst potentially suffering a substantial impact, and apparently undertrading even before any impacts, the Co-op supermarket at Barry Road should be able to continue its role as a local neighbourhood store. However, it might find it necessary to reduce in size to compensate for falling sales.
- g) The Sainsburys superstore at Sixfields and Tesco superstore at Mere Way as currently existing would both suffer substantial loss of convenience goods sales. Part of the losses would be due to the proposed extensions to these stores diluting the sales potential of the existing floorspace. However, the greatest impacts would be due to the proposed new superstores at Nene Valley Retail Park and Barrack Road. Against this, the increases in floorspace at Sainsburys and Tesco would help to mitigate loss of sales to these proposed new superstores. We estimate that in Scenario 7, when sales in the existing and extended floorspace are added together, the overall result would be that convenience goods sales in the extended Sainsburys would be about £47.45m, or about 18% lower than in the currently existing store. In Tesco, the combined sales would be about £52.96m, or about 19% lower than in the currently existing store. Both stores would continue to trade at this level of cumulative impact. However it is not unlikely that either or both of Sainsburys and Tesco would decide not to undertake the proposed superstore extensions, or would limit the extensions to additional comparison goods floorspace only, if new superstores were permitted at Nene Valley Retail Park and Barrack Road.
- h) Northampton Town Centre as currently existing would suffer a fairly substantial cumulative impact of about 27% under Scenario 7. However, this would be mitigated by the additional sales in the committed new Tesco Metro store. The result would be that with this new store, combined convenience goods sales in the town centre would be only about 2% lower under Scenario 7 than they would be with none of the committed or proposed new developments (Scenario 1). However, the cumulative impacts on other stores in Northampton would make it very unlikely that a substantial new foodstore of about 3,000 sq m net could be attracted to the town centre, as envisaged by the emerging Joint Core Strategy. With such impacts, retailers would be unlikely to see sufficient potential for such a new town centre superstore to trade successfully. For the same reason, it would probably also be difficult to attract retailers to operate all the 'anchor' supermarkets in the neighbourhood centres in the new 'sustainable urban extensions' proposed in the emerging Joint Core Strategy.

FINAL

- i) Weston Favell District Centre would suffer only modest cumulative impact, of about 14% under Scenario 7. This is because all of the proposed developments are in the western half of the town, whereas Weston Favell is towards its eastern edge. Whilst this cumulative impact would leave it trading at about 84% of its 'benchmark' level, it is a strong and attractive centre with a substantial proximate residential catchment area. We would therefore not expect substantial adverse effects on this centre as a whole, even if all of the committed and proposed developments were implemented.
- j) Comparison between Scenarios 3 and 8 shows that the cumulative impacts from these superstore extensions on convenience goods sales would be broadly similar; albeit slightly higher for Sainsburys than for Tesco, and with some minor differences in the distribution of impacts.
- k) Comparison between the incremental impacts of either of the proposed new superstore extensions in Scenarios 3 and 8 (shown in the penultimate columns of Tables 10 and 15 respectively) with the incremental impacts from either of the proposed new superstores in Scenarios 4 and 6 (shown in the penultimate columns of Tables 11 and 13 respectively), shows that the individual impact of either of the superstore extensions would be much less than that of either of the proposed new superstores alone. Even the combined cumulative impacts of both proposed superstore extensions (Scenario 9) would for most stores and centres be significantly less than the individual impacts of either of the proposed new superstores. This can be seen by comparing the penultimate column of Table 16 with those of Tables 11 and 13.

Comparison Goods

37. Our comparison goods retail impact forecasts are simpler than those for convenience goods for the reasons explained above. They cover only Northampton Town Centre, Kingsthorpe District Centre, Weston Favell District Centre, and the out-of-centre retail parks and superstores as a group. The forecasts are set out in Tables 21 (Scenarios 1 & 2) to 28 (Scenario 9) in our Appendix 3. Tables 21 to 26 for Scenarios 1 to 7 show how cumulative impact builds up as additional developments are added. Table 27 shows the cumulative impact of the committed developments and the proposed Tesco superstore extension, for comparison with Table 22 (for the committed developments plus the proposed Sainsburys superstore extension). Table 28 shows the cumulative impacts of the committed developments plus both proposed superstore extensions.
38. Comparison goods impacts would be much less than convenience goods impacts because:
- Combined comparison goods sales in the committed and proposed developments would be much less than combined convenience goods sales. Table 4 in our Appendix 3 shows that the former would be about £52.03m, whilst the latter would be about £141.97m, at 'benchmark' levels.

FINAL

- Growth in comparison goods expenditure is forecast to be much greater than in convenience goods expenditure. Table 3 in our Appendix 3 indicates growth in total catchment area convenience goods expenditure between the base and design years of only £22.85m or 3.2%; but growth in comparison goods expenditure of £161.72m or 14.1%. Not all of this will be attracted by shops and stores in Northampton. However even allowing for this, it is clear that growth in convenience goods expenditure will be nowhere near enough to support the increase in convenience goods sales due to the committed and proposed developments; whereas the increase in comparison goods sales should be more than sufficient to support the increase in comparison goods sales in these developments.

39. The increasing comparison goods impacts are summarised in Table 29. The most important findings in Table 29 are as follows:
- i. The category 'out-of-centre retail parks & superstores' (which is mainly retail parks rather than superstores), would suffer the lowest cumulative impacts. This is realistic, because the retail parks mainly sell 'bulky' comparison goods, rather than the general merchandise which would be sold from the proposed new superstores and superstore extensions. The latter would compete more directly with the town centre (in particular) and the district centres, than with the out-of-centre retail parks.
 - ii. Northampton Town Centre, Kingsthorpe District Centre and Weston Favell District Centre would all suffer similar percentage cumulative impacts. However, the town centre would lose much more sales than the district centres; because it has much greater pre-impact sales. It is also the most directly competitive with the comparison goods sales in the proposed developments; both as to the type of goods sold, and through being closer to the proposed developments than is Weston Favell District Centre.
 - iii. At the design year, all locations would be trading at above the base year level, despite the cumulative impacts in Scenario 7. However, approximately half the growth in comparison goods expenditure due to Northampton (assuming constant market shares of catchment area expenditure attracted) would be decentralised to out-of-centre superstores and supermarkets, under Scenario 7. This would be likely to make it significantly more difficult to achieve substantial new town centre comparison goods development in accordance with the emerging Joint Core Strategy, and the objectives of Northampton Borough Council for the town centre.
 - iv. The build up of cumulative impact would be much more equal between Scenarios 3 and 6 for comparison goods than for convenience goods. This is because the four proposed developments represented by these scenarios would have broadly similar levels of comparison goods sales, ranging from just over £9m to just under £13m, as indicated in Table 4 in our Appendix 3.

FINAL

- v. The cumulative impacts of the proposed Sainsburys and Tesco superstore extension would be very similar. However, the Sainsburys extension would have a somewhat higher impact on Kingsthorpe District Centre than the Tesco extension, but a somewhat lower impact on Weston Favell District Centre.
- vi. The proposed Waitrose store would have an insignificant impact on comparison goods sales in any store or centre, because it would have a low level of comparison goods sales.

CONCLUSIONS AND RECOMMENDATIONS

- 40. Before setting out our conclusions, we must point out that the actual outcomes in terms of retail impacts would depend on the identity of the retailers which would occupy the proposed new superstores at Nene Valley Retail Park and Barrack Road, if these were permitted. The planning applications for them have been submitted by the landowners, and are not yet publicly or contractually supported by retailers. This makes it impossible to be sure of the likely retail impacts. It also makes it difficult to advise on which applications should be permitted and which refused – particularly since it is not practicable to limit a planning permission to a single retailer. It means that we are only able to give conditional advice on the optimum balance of new developments, as indicated below.
- 41. We understand that Asda would be the most likely operator of the proposed superstore at Nene Valley Retail Park, and Tesco would be the most likely operator of that at Barrack Road; but that this is not yet confirmed. However, we comment below on the implications if that should be the case, as seems likely. We consider it very unlikely that either Sainsburys or Morrisons would wish to occupy either of the two proposed new superstores, because of their close proximity to both companies' existing stores. We also consider it unlikely that Tesco would wish to occupy the proposed Nene Valley Retail Park superstore, or Asda would wish to occupy the proposed Barrack Road superstore, for the same reason.
- 42. It is beyond our terms of reference for this cumulative retail impact study to review compliance of each proposed development with the sequential approach; and we have previously advised on this in relation to the proposed new superstores and superstore extensions. However, we consider that of all the proposed developments, the Waitrose supermarket would be the least likely to comply with the sequential approach. This is because it is the smallest proposed new store, and therefore potentially the most likely to be capable of being accommodated in the town centre. It could potentially help to anchor the proposed Grosvenor Centre extension; or be accommodated on another site or in an existing building in the town centre, subject to availability, suitability and viability. As such, it would be the large new foodstore in the town centre envisaged by the emerging Joint Core Strategy, thus helping to implement that Strategy. As a high quality supermarket, it would help to raise the overall quality of the town centre retail offer.

Conclusions on Retail Impact

43. Our first conclusion is that because the proposed new superstores would be the most damaging in terms of retail impact, not more than one at most should be permitted. Our revisions to the WNRSU capacity forecast for new convenience goods floorspace show that there is currently insufficient capacity (after allowing for the committed developments) for even one new superstore. By 2014, there should just be capacity for one, assuming that no other developments (apart from those already committed) are permitted. Even so, there would be impacts on existing stores and centres, because the forecast capacity is predicated on the basis that sales in the existing stores which are trading at above 'benchmark' levels, would fall to those levels, i.e. suffer impacts.
44. Second, neither of the proposed new superstores would be well located, as both would suffer from the locational drawbacks of the Morrisons superstore at Victoria Parade, which is the most under-performing store in the town. Of the two, the proposed superstore at Barrack Road would be better located than that at Nene Valley Retail Park. It would have a smaller impact on the vulnerable Morrisons at Victoria Parade; and would be better able to help relieve the substantial over-trading of the Morrisons superstore at Kettering Road. It would also be somewhat closer to large residential areas, thus being more likely to reduce the need to travel. Against this, it would have a slightly greater impact on Northampton Town Centre, and a significantly greater impact on Kingsthorpe District Centre.
45. Third, either of the proposed new superstores would be a direct alternative to a large new foodstore in Northampton Town Centre, as envisaged by the emerging Joint Core Strategy. If either was built, we do not think that there could be a large new foodstore in the town centre; with the possible exception of a Waitrose supermarket (if Waitrose is not permitted to develop out-of-centre), or an enlarged Sainsburys and/or Marks & Spencer foodhall.
46. Fourth, developing either of the proposed new superstores (in addition to the committed developments) would substantially reduce the need for extensions to the existing out-of-centre Sainsburys and Tesco superstores at Sixfields and Mere Way respectively. Either would have significant impacts on both of these stores, thus helping to relieve the current overtrading in them.
47. Fifth, the proposed Waitrose store would reduce the need for the proposed extension of Tesco at Mere Way, and would improve access to foodstores in their locality for residents of the town south of the river.
48. Sixth, competition between foodstores and consumer choice would be better served by extending the Sainsburys superstore at Sixfields than by extending the Tesco superstore at Mere Way – particularly if Tesco was able to obtain a new superstore at Barrack Road. This is because Tesco already has two large Tesco Extra superstores, whereas Sainsburys has only one superstore, which is significantly smaller than either

FINAL

Tesco superstore. The Sainsburys superstore at Sixfields has a net sales area of 4,131 sq m. In comparison, Tesco Extra at Mere Way has a net sales area of 5,733 sq m, and Tesco Extra at Weston Favell has a net sales area of 7,295 sq m, making a total net sales area in superstores for Tesco of 13,028 sq m (more than three times that of Sainsburys). Morrisons has a combined net sales area in its two superstores of 6,954 sq m. If Tesco was able to acquire another superstore at Barrack Road (and even more so if the proposed Waitrose was also permitted), there would be no justification in terms of retail capacity, impact or competition for extending the Tesco superstore at Mere Way.

49. Seventh, the proposed new superstores and superstore extensions would decentralise a substantial proportion of the growth in comparison goods expenditure, which will be attracted to Northampton. In view of the long-standing policies for enhancement of the town centre, the policies in the emerging Core Strategy, and work by Northampton Borough Council and the private sector to bring forward a major extension of the Grosvenor Centre as early as possible, such large scale decentralisation of expenditure would be contrary to PPS4. It would make it significantly more difficult to achieve a major town centre comparison goods retail development at an early date.

Compliance with PPS4

50. The principal retail impact tests are set out in Policy EC16.1 of PPS4. Our conclusions on compliance of the five proposed developments with these tests are as follows:

EC16.1.a. *'The impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal.'*

51. The greatest impacts would occur from the proposed new superstores. Either would put at risk the emerging Joint Core Strategy policy for a large new foodstore in Northampton Town Centre. Also, any of the proposed new superstores and superstore extensions would make it significantly harder to achieve a major comparison goods retail development in Northampton Town Centre in accordance with long-standing planning policy and the emerging Joint Core Strategy. We therefore consider that either of the proposed new superstores, would result in significant impacts under this policy criterion.
52. Either of the proposed superstore extensions on its own would be less likely to put at risk the emerging policy for a large new foodstore in the town centre; but either would make it significantly harder to achieve a major comparison goods retail development in the town centre. We therefore conclude that either of the proposed superstore extensions would result in significant impacts under this policy criterion, albeit impacts which would be less than those of the proposed new superstores. The significance of the impact under this policy criterion would be reduced to a more acceptable level if only one of the two proposed superstore extensions was permitted.

53. Because of its somewhat specialist nature, the proposed Waitrose supermarket would have only an insignificant impact on the prospects for securing a large new foodstore in the town centre. Its impact on the prospects for a major town centre comparison goods development would be negligible, because it would have very small comparison goods sales. However it would have a smaller impact and bring greater benefits if it was located in the town centre in implementation of the emerging Joint Core Strategy, rather than on the currently proposed out-of-centre site.

EC16.1.b. *'The impact of the proposal on town centre vitality and viability, including local consumer choice and the range and quality of the comparison and convenience retail offer.'*

54. The convenience goods floorspace in the proposed developments would not have a significant impact on the town centre in these terms; as even under Scenario 7, total convenience goods sales in the town centre would be only about 2% lower than if none of the committed and proposed developments was implemented. The comparison goods floorspace in any of the proposed developments apart from Waitrose would have a significant adverse impact; by decentralising growth in expenditure which will be needed to bring the large number of currently vacant shops back into use, and to support major new town centre development.

EC16.1.c. *'The impact of the proposal on allocated sites outside town centres being developed in accordance with the development plan'*

55. We understand that there are no such sites in the extant development plan, and so this criterion does not apply. However it will increasingly apply in relation to the new neighbourhood centres to serve the 'sustainable urban extensions', proposed in the emerging Joint Core Strategy, as this becomes the adopted development plan. Development of new convenience goods floorspace in the existing and proposed new superstores, if provided on a greater scale than is supportable by growth in convenience goods expenditure, would have significant adverse impacts on the prospects for achieving such new neighbourhood centres.

EC16.1.d. *'In the context of a retail or leisure proposal, the impact of the proposal on in-centre trade/turnover and on trade in the wider area, taking account of current and future consumer expenditure capacity in the catchment area up to five years from the time the application is made, and where applicable on the rural economy.'*

56. In view of the conclusions on retail impact set out above, we consider that either of the proposed new superstores would have significant adverse impacts on in-centre trade/turnover and on trade in the wider area. Either of these significantly exceeds estimated current capacity for new convenience goods floorspace (after taking account of the committed developments); and capacity for not more than one at most will be likely to exist by 2014.

FINAL

57. Considered on its own, neither the proposed Sainsburys nor Tesco superstore extensions would be likely to have a significant adverse impact on in-centre trade/turnover. However, if both were to be permitted, they would together have a significant adverse impact. Permitting one would therefore make the other fail to comply with this policy criterion. The proposed Waitrose supermarket on its own would be unlikely to have a significant adverse impact on in-centre trade/turnover.
58. In view of the foregoing, we consider that the cumulative impact of more than one of the proposed developments (in addition to the committed developments) would be significant. This particularly applies to the proposed new superstores and superstore extensions, because of their substantial comparison goods sales (which would be much greater than that of Waitrose). Thus more than one of the proposed superstores and superstore extensions would be unlikely to comply with this policy criterion of PPS4.

EC16.1.e. 'If located in or on the edge of a town centre, whether the proposal is of an appropriate scale (in terms of gross floorspace) in relation to the size of the centre and its role in the hierarchy of centres.'

59. None of the proposed developments would be in or on the edge of a town centre, so this policy criterion does not apply.

EC16.1.f. 'Any locally important impacts on centres under policy EC3.1.e.'

60. We are not aware of any such locally important impacts, and so this policy criterion also does not apply.

Recommendations

61. We recommend that both of the proposed new superstores be refused planning permission. Northampton already has 5 superstores and a wide range of supermarkets; so there is no strong case for another superstore, which would have significant adverse impacts. However, if it is decided to grant planning permission for one, we recommend that it be the proposed superstore at Barrack Road, rather than that at Nene Valley Retail Park.
62. If planning permission is granted for the proposed superstore at Barrack Road, and the application at Nene Valley Retail Park is refused, we recommend that the proposed extensions of the Sainsburys superstore at Sixfields and the Tesco superstore at Mere Way be also refused.
63. If both proposed new superstores are refused planning permission, we recommend that planning permission be granted for only one of the proposed superstore extensions. This would leave open the potential for a large new foodstore in the town centre, such as a Waitrose supermarket (provided this was not permitted out-of-centre), in due course. It would also be likely to have the least adverse impact on the prospects for

FINAL

achieving new supermarket-anchored local centres, in the 'sustainable urban extensions' proposed in the emerging Joint Core Strategy. We consider that permitting the Sainsburys extension and refusing the Tesco extension would result in the optimum balance between impacts, local provision of foodstores, increased competition between retailers, and improved consumer choice.

64. If both proposed new superstores are refused planning permission, and permission is granted for the proposed Sainsburys superstore extension, we recommend that the grant of planning permission for the proposed Tesco extension be only considered in addition if Waitrose is directed to the town centre in accordance with the sequential approach, rather than being permitted on the currently proposed out-of-centre site. However, if Waitrose is to be permitted on the out-of-centre site, we recommend that the proposed Tesco superstore extension be refused planning permission.
65. Irrespective of what other proposed developments are permitted, we recommend that every effort be made to direct Waitrose to the town centre, rather than permitting such a new foodstore on the currently proposed out-of-centre site. The case against permitting the proposed out-of-centre Waitrose would be even greater, if the proposed Tesco extension was to be permitted.
66. We understand that it has been asserted on behalf of the owners of Nene Valley Retail Park that a food superstore could be operated there under the terms of the existing planning permissions; but that this has been challenged by other opinions. This is a legal matter on which we are not qualified to comment. However, if it should prove to be the case that a superstore could legally be operated there, it follows from our recommendations above that planning permission should be refused for all of the other proposed developments.

Reasons for Refusal and Planning Conditions

67. There may be a range of reasons for refusal of planning permission for some or all of the proposed developments, including non-retail reasons, which WNDC will need to consider. The principal retail planning reasons for refusal of either of the two proposed new superstores would be that together with already committed developments¹ it would have a significant adverse impact on the prospects for achieving planned major new town centre retail development; it would have a significant adverse impact on the vitality and viability of the town centre; and it would have significant adverse impacts on in-centre trade/ turnover and on trade in the wider area; and as a result would fail to comply with Policy EC16.1 of PPS4.
68. If the proposed Sainsburys superstore extension is permitted, the principal retail planning reasons for refusal of the proposed Tesco superstore extension would be that together with already committed developments² it

¹ Which would include the Sainsburys and/or Tesco superstore extensions, if either or both of these were permitted.

² Which would include the Sainsburys extension.

FINAL

would have a significant adverse impact on the prospects for achieving planned major new town centre retail development; it would have a significant adverse impact on the vitality and viability of the town centre; and it would have significant adverse impacts on in-centre trade/ turnover and on trade in the wider area; and as a result would fail to comply with Policy EC16.1 of PPS4.

69. Whichever proposed developments are granted planning permission, we recommend that the permissions be subject to clear and strict conditions to control the size of the development, restrict future increases in floorspace, and limit the floorspace which may be used for the sale of comparison goods, as we have previously advised.

If you have any queries or require further information, please do not hesitate to contact me at AECOM on 0203 009 2100 or david.cassells@aecom.com.

AECOM

AECOM

Appendix 1

Advice to AECOM and Jonathan Baldock on West Northamptonshire Retail Capacity Study Inputs – March 2011

1.1 This document responds to the request for additional information from AECOM and Jonathan Baldock to facilitate a cumulative impact assessment of the various proposals for comparison and convenience retail floorspace development in Northampton. The information forms part of the West Northamptonshire Retail Capacity Study update, which was completed by Roger Tym & Partners (RTP) on behalf of the West Northamptonshire Joint Planning Unit in February 2011.

1.2 Mr. Baldock has requested the following information from RTP:

- *The evidence supporting your assumed inflow of 11% of comparison goods expenditure to Northampton Borough from outside your catchment area;*
- *The comparison goods floorspace and 'benchmark' sales densities, distinguishing between Northampton Town Centre, the district centres, the retail parks, and out-of-centre food superstores;*
- *The convenience goods floorspace and 'benchmark' sales densities, for each individual foodstore in Northampton, which you used in calculating the 'turnover above company benchmarks' and 'claims on capacity'.*

1.3 We discuss these points in turn below.

Comparison goods inflow into West Northamptonshire

1.4 Table 7a of Appendix 3 of the WNRCS identifies an 11 per cent rate of inflow expenditure into Northampton Borough from outside the West Northamptonshire study area. The 11 per cent inflow is equivalent to £81.4m, which represents 11 per cent of the total amount of expenditure retained by centres in West Northamptonshire (£732.4m, Row C, Table 6). It is assumed that no other destination in West Northamptonshire attracts inflow from outside the study area.

1.5 The 11 per cent inflow figure reflects the fact that the following market shares to Northampton town centre were identified from the Outer Catchment Area from the household survey¹ (**Table 1**).

Table 1 – Market shares to Northampton town centre from Outer Catchment Area

Outer Catchment Area Zone	A	B	C	D	E	F	G
Market share to Northampton TC	1.60%	3.03%	1.67%	2.13%	9.41%	7.52%	8.85%

1.6 In monetary terms, the market share from these Outer Catchment Area zones represents 11 per cent of the total turnover of Northampton town centre in 2010.

¹ These figures are not provided in market shares tabulations in Appendix 3 to the study as the study area solely focuses on the West Northamptonshire Catchment Area (i.e. Zones 1 to 11). Instead they are accounted for by inflow in Table 7a of Appendix 3. A plan showing the boundaries of the Outer Catchment Area zones is provided at Figure 4.1 of Volume 1 of the WNRCS.

Comparison goods floorspace and benchmark sales densities

- 1.7 We set out below (**Table 2**) our assessment of major comparison goods shopping destinations in Northampton. Floorspace figures are derived from Experian Goad, with the exception of the foodstores which is based on RTP estimates of floorspace derived from the overall floorspace of the store as set out in the IGD (2009).

Table 2 – Estimated comparison goods floorspace in Northampton

	Sq.m gross comparison floorspace	Sq.m net comparison floorspace (assumed 70% of gross)	Experian Goad survey date
Town centres			
Northampton town centre	75,550	52,885	September 2008
District and other centres			
Weston Favell DC	11,840 (includes Focus DIY store on Billing Brook Road)	8,288	July 2009
Kingsthorpe DC	2,640	1,848	September 2007
Kingsley Park	1,830	1,281	September 2009
Wellingborough Road	5,420	3,794	September 2009
Sub-total	21,730	15,211	-
Retail Parks			
Sixfields RP	18,140	-	July 2007
Riverside RP	16,440	-	August 2009
St James RP	13,930	-	August 2009
Nene Valley RP	24,530 (includes B&Q, Towcester Road)	-	August 2009
Sub-total	73,040	-	-
Foodstores			
Morrisons, Kettering Road	-	777	-
Tesco Extra, Mereway	-	1,152	-
Tesco Extra, Weston Favell DC	-	2,396	-
Sainsbury's, Gambrel Road	-	682	-
Morrisons, Victoria Promenade	-	838	-
Asda, Kingsthorpe DC	-	652	-
Waitrose, Kingsthorpe DC	-	351	-
Sainsbury's, Grosvenor Centre	-	376	-
Sub-total	-	7,224	-
Overall total	-	126,548	-

Note: comparison goods floorspace in supermarkets is calculated from subtracting net convenience floorspace in foodstores shown in the second column of Table 3 from overall net floorspace shown in the first column of Table 3.

- 1.8 We have not undertaken a 'benchmarking' exercise for comparison goods floorspace, as it is considered that the household survey results indicate in Northampton town centre is currently under-trading compared to the retail parks in the town, which have a similar amount of floorspace, but combined attract a greater turnover than the town centre, as discussed at paragraph 5.15 of the WNRCS.

- 1.9 In respect of the floorspace figures set out above, it should be noted that Experian Goad centre boundaries do not necessarily correlate with those used by the Council or other sources, and we are aware of discrepancies in the figures over the amount of retail floorspace in both Northampton town centre and the retail parks, with the previous retail study undertaken by CBRE identifying a much higher level of comparison goods floorspace in Northampton town centre (83,825 sq.m net²). Accordingly we advise that the figures set out above are treated with caution.
- 1.10 Nevertheless, irrespective of which figures are used, the findings of the study in respect of the underperformance of the town centre in terms of turnover per sq.m vis-à-vis the performance of the retail parks remain valid.

Convenience goods floorspace and benchmark sales densities

- 1.11 Finally, we set out below (**Table 3**) the convenience goods floorspace and benchmark sales densities for foodstores in Northampton, which informed our assessment of overtrading. It should be noted that the ‘benchmarking’ exercise – i.e. comparing the turnover of individual stores against what would be expected by applying an operator average sales density to the convenience floorspace of the store – was only undertaken for the large ‘main’ food shopping destinations. With the exception of Sainsbury’s in the Grosvenor Centre, smaller ‘metro’/‘express’ format stores were not included in the assessment.
- 1.12 It can be seen that cumulatively foodstores in Northampton were found to be over-trading in the region of £55.6m. This reflects the figure shown in the row ‘Turnover above company benchmarks’ in Table 12a of Appendix 3 of the WNRCS.

Table 3 – Convenience floorspace, sales density and trading performance of main foodstores in Northampton

Store	Net floorspace sq.m	Convenience net floorspace sq.m	Sales density £ per sq.m	Benchmark turnover £m	Actual turnover (from HHS) £m	Difference £m
Morrisons, Kettering Road	3,345	2,568	11,867	30.48	69.04	38.57
Tesco Extra, Mereway	5,585	4,433	13,611	60.34	63.39	3.05
Tesco Extra, Weston Favell DC	7,295	4,899	13,611	66.68	56.46	-10.22
Sainsbury's, Gambrel Road	4,131	3,449	10,372	35.77	56.01	20.23
Morrisons, Victoria Promenade	3,609	2,771	11,867	32.89	33.01	0.12
Asda, Kingsthorpe DC	1,480	828	15,035	12.45	21.22	8.77
Waitrose, Kingsthorpe DC	2433	2,082	11,846	24.66	20.61	-4.05
Sainsbury's, Grosvenor Centre	1,879	1,503	10,372	15.59	14.76	-0.83
Total				278.85	334.50	+55.65

- 1.13 The ‘claims on capacity’ in Table 12a do not refer to the overtrading of foodstores, as suggested in Mr. Baldock’s request. Rather, they represent the efficiency growth of existing

² CBRE Northampton Retail & Leisure Capacity Study 2006, Appendix 2, Table 5b

foodstores in Northampton. Row C of Table 12a shows that the foodstores in Northampton attract a turnover of £405.9m in 2010. Over the course of the study period, it would be expected that these existing stores improve their trading efficiency through internal refurbishment, better use of floorspace and such. This 'claim' is shown in Row G of Table 12a, and is based on the application of the following floorspace productivity growth rates to the turnover of £405.9m:

- 2010-2016: 0.26 per cent, per annum
- 2016-2026: 0.30 per cent, per annum

1.14 **Table 4** below summarises this growth.

Table 4 – Growth in claims on convenience goods expenditure capacity, 2010-2026

	2010	2016	2021	2026
Turnover of existing foodstores in Northampton	£405.9m	£412.2m	£418.5m	£424.8m
Growth in productivity from 2010 (Row G, Table 12a)	-	+£6.3m	+£12.5m	+£18.8m

Roger Tym & Partners

11 March 2011

Appendix 2

Revised RTP Table 3 - Convenience floorspace, sales density and trading performance of main foodstores in Northampton

Store	Net Floorspace	Convenience Goods Net Floorspace	Convenience Goods Sales Density	Convenience Goods 'benchmark' turnover	Actual convenience goods turnover (from HHS)	Difference ('surplus' or overtrading)
	(sq m)	(sq m)	(£ per sq m)	(£m)	(£m)	(£m)
Morrisons, Kettering Road	3,345	2,509	16,188	40.62	69.04	28.42
Tesco Extra, Mere Way	5,733	3,810	12,787	48.72	63.39	14.67
Tesco Extra, Weston Favell	7,295	4,888	12,787	62.50	56.46	- 6.04
Sainsburys, Sixfields	4,131	3,511	12,288	43.14	56.01	12.87
Morrisons, Victoria Promenade	3,609	2,707	16,188	43.82	33.01	- 10.81
Asda, Kingsthorpe	1,480	1,332	13,378	17.82	21.22	3.40
Waitrose, Kingsthorpe	2,433	2,092	11,065	23.15	20.61	- 2.54
Sainsburys, Northampton Town Centre	1,879	1,503	12,288	18.47	14.76	- 3.71
TOTALS				298.24	334.50	36.26

Sources:

RTP supplementary Table 3
 AECOM estimates, based on floorspace data in applicants' retail assessments; and on sales densities and space allocations from Verdict Research Limited

Appendix 3

NORTHAMPTON CUMULATIVE RETAIL IMPACT MODEL 2011

West Northamptonshire Development Corporation

Date of Latest Revision: 26-Apr-11

File Name: Northampton Final Cumulative Impact Model

Price Basis: 2008 prices

Scenarios Modelled:	1	Baseline', assuming market shares indicated by WNRSU 2010 remain unchanged in 2014, with no new developments
	2	Committed new foodstores open by 2014
	3	Committed new foodstores plus Sainsburys extension at Sixfields open by 2014
	4	Committed new foodstores, plus Sainsburys extension at Sixfields and Nene Valley Retail Park superstore open by 2014
	5	Committed new foodstores, plus Sainsburys extension at Sixfields, Nene Valley Retail Park superstore and Tesco extension at Mere Way open by 2014
	6	Committed new foodstores, plus Sainsburys extension at Sixfields, Nene Valley Retail Park superstore, Tesco extension at Mere Way & new superstore at Barrack Road open by 2014
	7	Committed new foodstores, plus Sainsburys extension at Sixfields, Nene Valley Retail Park superstore, Tesco extension at Mere Way, new superstore at Barrack Road & potential Waitrose at Wyevale Garden Centre open by 2014
	8	Committed new foodstores plus Tesco extension at Mere Way open by 2014
	9	Committed new foodstores, plus Sainsburys extension at Sixfields & Tesco extension at Mere Way, open by 2014

Notes:

This Model is based on and uses data from the West Northamptonshire Retail Study Update 2011 (WNRSU), February 2011, by Roger Tym & Partners; which was commissioned by the West Northamptonshire Joint Planning Unit as part of the evidence base for the Joint Core Strategy.

Jonathan Baldock - Town Centres & Retail Planning Consultant

AECOM

Catchment Area Population & Expenditure

Table 1

POPULATION FORECASTS - West Northamptonshire Catchment Area

Year	Catchment Area Zones											Total
	1	2	3	4	5	6	7	8	9	10	11	
Base Year 2010	27,255	22,703	23,885	36,648	64,161	63,426	44,118	47,116	25,474	12,411	46,539	413,736
Design Year 2014	27,746	22,878	24,135	37,748	65,261	64,526	45,218	47,291	26,226	12,707	47,431	421,167
WNRSU Forecast 2016	27,992	22,965	24,260	38,298	65,811	65,076	45,768	47,378	26,602	12,855	47,877	424,882

Source: WNRSU, with interpolation for 2014 by AECOM

Table 2

PER CAPITA EXPENDITURE

	Year	Catchment Area Zones										
		1	2	3	4	5	6	7	8	9	10	11
CONVENIENCE GOODS:												
Including SFT (£)	2010	1,765	1,874	1,830	1,722	1,802	1,663	1,710	1,885	1,807	1,807	1,876
Excluding SFT (£)	2010	1,700	1,805	1,762	1,658	1,735	1,601	1,647	1,815	1,740	1,740	1,807
Including SFT (£)	2014	1,805	1,916	1,871	1,761	1,843	1,701	1,749	1,928	1,848	1,848	1,918
Excluding SFT (£)	2014	1,724	1,830	1,787	1,682	1,760	1,624	1,670	1,841	1,765	1,765	1,832
COMPARISON GOODS:												
Including SFT (£)	2010	3,131	3,354	3,272	2,920	3,052	2,828	3,086	3,329	3,282	3,228	3,447
Excluding SFT (£)	2010	2,765	2,962	2,889	2,578	2,695	2,497	2,725	2,940	2,898	2,850	3,044
Including SFT (£)	2014	3,571	3,825	3,732	3,330	3,481	3,225	3,519	3,797	3,743	3,681	3,931
Excluding SFT (£)	2014	3,099	3,320	3,239	2,891	3,021	2,799	3,055	3,295	3,249	3,195	3,412

SFT DEDUCTIONS:

Convenience Goods:	2010	3.7 %
	2014	4.5 %
Comparison Goods:	2010	11.7 %
	2014	13.2 %

GROWTH IN PER CAPITA EXPENDITURE

Convenience Goods:	0.56 % pa
Comparison Goods:	3.34 % pa

Source: WNRSU, with interpolation for 2014 by AECOM

Notes: 2008 prices

Table 3

TOTAL EXPENDITURE West Northamptonshire Catchment Area (excluding SFT)

Goods Category / Year	Catchment Area Zones											Total
	1	2	3	4	5	6	7	8	9	10	11	
	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	(£m)	
CONVENIENCE GOODS:												
Base Year 2010	46.33	40.97	42.09	60.77	111.34	101.57	72.65	85.53	44.33	21.60	84.08	711.26
Design Year 2014	47.82	41.87	43.13	63.48	114.85	104.79	75.51	87.05	46.28	22.42	86.90	734.11
COMPARISON GOODS:												
Base Year 2010	75.35	67.24	69.01	94.49	172.91	158.38	120.22	138.50	73.82	35.38	141.65	1,146.95
Design Year 2014	86.00	75.96	78.17	109.11	197.17	180.64	138.13	155.84	85.20	40.60	161.84	1,308.67

Source:

Tables 1 and 2

Sales Assumptions for Committed and Proposed Developments

Table 4

COMMITTED AND PROPOSED FOODSTORES AND FOODSTORE EXTENSIONS

Development	Net Sales Area (sq m)	Conv Gds Allocation (%)	Conv Gds Net Sales Area (sq m)	Conv Gds Sales Density 2009 (£ / sq m net)	Conv Gds Sales 2014 (£m)	Comp Gds Net Sales Area (sq m)	Comp Gds Sales Density 2009 (£ / sq m net)	Comp Gds Sales 2014 (£m)
Commitments:								
Tesco Metro, Northampton TC	665	85.0	565	12,787	7.43	100	7,550	0.80
Aldi, Wellingborough Rd	1,040	67.0	697	6,699	4.80	343	5,574	2.04
Netto extension, Far Cotton	509	81.0	412	6,751	2.86	97	6,166	0.64
Sub-Total Commitments	2,214		1,674		15.09	540		3.47
Proposals:								
Sainsburys extension, Sixfields	2,489	36.4	906	12,288	11.45	1,583	7,575	12.77
Nene Valley Retail Park superstore	4,550	75.0	3,413	13,000	45.62	1,138	7,500	9.09
Tesco extension, Mere Way	2,161	28.4	614	12,787	8.07	1,547	7,550	12.44
Royal Mail site superstore	5,140	70.0	3,598	13,000	48.10	1,542	7,500	12.32
Waitrose, Wyevale Garden Centre	1,394	86.0	1,199	11,065	13.64	195	9,284	1.93
Sub-Total Proposals	15,734		9,729		126.88	6,005		48.55
GRAND TOTAL ALL DEVELOPMENT	17,948		11,403		141.97	6,545		52.03

Floorspace Efficiency Factors 2009 to 2014:	Convenience Goods 0.56 % pa	Comparison Goods 1.27 % pa
---	--------------------------------	-------------------------------

Sources:

WNDC & AECOM for commitments
 Planning applications & AECOM for proposals
 Sales densities by AECOM based on Verdict Research Limited
 Floorspace efficiency factors from WNRSU 2011

Notes:

'Generic' sales densities assumed for Nene Valley Retail Park and Royal Mail site superstores
 This table indicates the sales if all the committed and proposed developments trade at their respective 'benchmark' company average sales densities. It does not allow for them impacting on each other, and thus reducing their sales below their benchmark levels. The latter phenomenon is allowed for in the cumulative impact tables which follow.

Convenience Goods Market Shares, and Sales in Existing Stores & Centres

Table 5

CONVENIENCE GOODS MARKET SHARES OF EXISTING STORES & CENTRES IN 2010

Store / Centre	Catchment Zone										
	1 (%)	2 (%)	3 (%)	4 (%)	5 (%)	6 (%)	7 (%)	8 (%)	9 (%)	10 (%)	11 (%)
Sainsburys, Sixfields	0.55	23.99	4.97	40.79	7.37	1.41	7.72	1.80	3.79	2.63	0.00
Aldi St James End	0.57	1.83	1.16	7.01	0.55	0.85	0.00	0.00	0.00	0.00	0.00
Iceland, St James End	0.00	0.69	0.58	6.09	0.00	0.43	0.37	0.00	0.00	0.00	0.00
Tesco Express, Bordeaux Close, Duston	0.00	0.00	0.00	2.39	0.00	0.00	0.00	0.90	0.00	0.00	0.00
Other foodstores in Zone 4	0.13	0.00	0.00	5.72	0.00	1.41	0.38	0.00	0.00	0.00	0.00
Morrisons, Victoria Promenade	0.00	6.75	1.31	8.62	5.00	4.10	13.46	0.00	1.53	19.76	0.00
Asda, Kingsthorpe District Centre	0.57	5.17	4.39	3.56	11.95	0.42	0.37	0.00	0.00	1.34	0.64
Waitrose, Kingsthorpe District Centre	0.00	4.62	5.74	0.83	12.88	0.43	0.19	1.03	0.00	0.00	0.00
Sub-Total, Kingsthorpe District Centre	0.57	9.79	10.13	4.39	24.83	0.85	0.56	1.03	0.00	1.34	0.64
Sainsburys, Northampton Town Centre	0.00	3.72	0.15	5.55	5.88	1.47	0.84	0.00	0.00	5.30	0.00
Marks & Spencer, Northampton Town Centre	0.00	0.39	0.75	0.42	0.22	0.00	0.09	0.00	0.00	2.63	0.00
Local Stores, Northampton Town Centre	0.00	0.12	0.00	0.84	0.39	2.04	1.15	0.00	0.00	0.31	0.00
Sub-Total, Northampton Town Centre	0.00	4.23	0.90	6.81	6.49	3.51	2.08	0.00	0.00	8.24	0.00
Co-op, Barry Road	0.00	0.00	0.00	0.00	2.01	0.12	0.00	0.00	0.60	0.00	0.00
Other foodstores & local shops in Zone 5 (inc Netto)	0.00	2.80	1.55	1.47	8.88	3.53	0.57	0.00	0.00	0.00	0.32
Morrisons, Kettering Road	0.00	4.41	9.37	4.28	26.38	29.77	0.75	0.00	1.21	0.00	0.00
Tesco Extra, Weston Favell District Centre	0.00	2.52	16.02	1.25	7.26	35.89	1.12	0.00	0.00	11.95	0.00
Lidl, Weston Favell District Centre	0.00	0.18	0.16	0.00	1.11	3.05	0.38	0.00	0.00	1.37	0.00
Sub-Total, Weston Favell District Centre	0.00	2.70	16.18	1.25	8.37	38.94	1.50	0.00	0.00	13.32	0.00
Other foodstores in Zone 6	0.00	0.12	0.53	0.42	1.12	5.78	0.19	0.00	0.00	0.61	0.00
Tesco Extra, Mere Way	0.00	16.29	0.58	6.77	3.25	0.24	59.26	0.00	1.98	21.10	0.00
Tesco Expresss, Butts Road	0.00	0.21	0.00	0.00	1.78	0.00	2.69	0.00	0.00	0.69	0.00
Other foodstores in Zone 7 (inc Netto Far Cotton)	0.00	0.33	0.31	0.00	0.20	0.00	6.09	0.00	0.00	0.00	0.00
TOTAL FOODSTORES IN NORTHAMPTON	1.82	74.14	47.57	96.01	96.23	90.94	95.62	3.73	9.11	67.69	0.96
Foodstores outside Northampton	98.18	25.86	52.43	3.99	3.77	9.06	4.38	96.27	90.89	32.31	99.04

Source:

WNRSU

Table 6

CONVENIENCE GOODS SALES IN EXISTING STORES & CENTRES IN 2010

Store / Centre	Catchment Zone											Totals (£m)
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)	
Sainsburys, Sixfields	0.25	9.83	2.09	24.79	8.21	1.43	5.61	1.54	1.68	0.57	0.00	56.00
Aldi, St James End	0.26	0.75	0.49	4.26	0.61	0.86	0.00	0.00	0.00	0.00	0.00	7.24
Iceland, St James End	0.00	0.28	0.24	3.70	0.00	0.44	0.27	0.00	0.00	0.00	0.00	4.93
Tesco Express, Bordeaux Close, Duston	0.00	0.00	0.00	1.45	0.00	0.00	0.00	0.77	0.00	0.00	0.00	2.22
Other foodstores in Zone 4	0.06	0.00	0.00	3.48	0.00	1.43	0.28	0.00	0.00	0.00	0.00	5.24
Morrisons, Victoria Promenade	0.00	2.77	0.55	5.24	5.57	4.16	9.78	0.00	0.68	4.27	0.00	33.01
Asda, Kingsthorpe District Centre	0.26	2.12	1.85	2.16	13.31	0.43	0.27	0.00	0.00	0.29	0.54	21.22
Waitrose, Kingsthorpe District Centre	0.00	1.89	2.42	0.50	14.34	0.44	0.14	0.88	0.00	0.00	0.00	20.61
Sub-Total, Kingsthorpe District Centre	0.26	4.01	4.26	2.67	27.65	0.86	0.41	0.88	0.00	0.29	0.54	41.83
Sainsburys, Northampton Town Centre	0.00	1.52	0.06	3.37	6.55	1.49	0.61	0.00	0.00	1.14	0.00	14.76
Marks & Spencer, Northampton Town Centre	0.00	0.16	0.32	0.26	0.24	0.00	0.07	0.00	0.00	0.57	0.00	1.61
Local Stores, Northampton Town Centre	0.00	0.05	0.00	0.51	0.43	2.07	0.84	0.00	0.00	0.07	0.00	3.97
Sub-Total, Northampton Town Centre	0.00	1.73	0.38	4.14	7.23	3.57	1.51	0.00	0.00	1.78	0.00	20.33
Co-op, Barry Road	0.00	0.00	0.00	0.00	2.24	0.12	0.00	0.00	0.27	0.00	0.00	2.63
Other foodstores & local shops in Zone 5 (inc Netto)	0.00	1.15	0.65	0.89	9.89	3.59	0.41	0.00	0.00	0.00	0.27	16.85
Morrisons, Kettering Road	0.00	1.81	3.94	2.60	29.37	30.24	0.54	0.00	0.54	0.00	0.00	69.04
Tesco Extra, Weston Favell District Centre	0.00	1.03	6.74	0.76	8.08	36.46	0.81	0.00	0.00	2.58	0.00	56.47
Lidl, Weston Favell District Centre	0.00	0.07	0.07	0.00	1.24	3.10	0.28	0.00	0.00	0.30	0.00	5.05
Sub-Total, Weston Favell District Centre	0.00	1.11	6.81	0.76	9.32	39.55	1.09	0.00	0.00	2.88	0.00	61.52
Other foodstores in Zone 6	0.00	0.05	0.22	0.26	1.25	5.87	0.14	0.00	0.00	0.13	0.00	7.92
Tesco Extra, Mere Way	0.00	6.67	0.24	4.11	3.62	0.24	43.05	0.00	0.88	4.56	0.00	63.38
Tesco Expresss, Butts Road	0.00	0.09	0.00	0.00	1.98	0.00	1.95	0.00	0.00	0.15	0.00	4.17
Other foodstores in Zone 7 (inc Netto Far Cotton)	0.00	0.14	0.13	0.00	0.22	0.00	4.42	0.00	0.00	0.00	0.00	4.91

Source:

Previous Tables

Table 7

CONVENIENCE GOODS SALES IN EXISTING STORES & CENTRES IN**2014****Scenario:****1**

Store / Centre	Catchment Zone											Totals (£m)
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)	
Sainsburys, Sixfields	0.26	10.04	2.14	25.89	8.46	1.48	5.83	1.57	1.75	0.59	0.00	58.03
Aldi, St James End	0.27	0.77	0.50	4.45	0.63	0.89	0.00	0.00	0.00	0.00	0.00	7.51
Iceland, St James End	0.00	0.29	0.25	3.87	0.00	0.45	0.28	0.00	0.00	0.00	0.00	5.13
Tesco Express, Bordeaux Close, Duston	0.00	0.00	0.00	1.52	0.00	0.00	0.00	0.78	0.00	0.00	0.00	2.30
Other foodstores in Zone 4	0.06	0.00	0.00	3.63	0.00	1.48	0.29	0.00	0.00	0.00	0.00	5.46
Morrisons, Victoria Promenade	0.00	2.83	0.57	5.47	5.74	4.30	10.16	0.00	0.71	4.43	0.00	34.20
Asda, Kingsthorpe District Centre	0.27	2.16	1.89	2.26	13.72	0.44	0.28	0.00	0.00	0.30	0.56	21.89
Waitrose, Kingsthorpe District Centre	0.00	1.93	2.48	0.53	14.79	0.45	0.14	0.90	0.00	0.00	0.00	21.22
Sub-Total, Kingsthorpe District Centre	0.27	4.10	4.37	2.79	28.52	0.89	0.42	0.90	0.00	0.30	0.56	43.11
Sainsburys, Northampton Town Centre	0.00	1.56	0.06	3.52	6.75	1.54	0.63	0.00	0.00	1.19	0.00	15.26
Marks & Spencer, Northampton Town Centre	0.00	0.16	0.32	0.27	0.25	0.00	0.07	0.00	0.00	0.59	0.00	1.66
Local Stores, Northampton Town Centre	0.00	0.05	0.00	0.53	0.45	2.14	0.87	0.00	0.00	0.07	0.00	4.11
Sub-Total, Northampton Town Centre	0.00	1.77	0.39	4.32	7.45	3.68	1.57	0.00	0.00	1.85	0.00	21.03
Co-op, Barry Road	0.00	0.00	0.00	0.00	2.31	0.13	0.00	0.00	0.28	0.00	0.00	2.71
Other foodstores & local shops in Zone 5 (inc Netto)	0.00	1.17	0.67	0.93	10.20	3.70	0.43	0.00	0.00	0.00	0.28	17.38
Morrisons, Kettering Road	0.00	1.85	4.04	2.72	30.30	31.20	0.57	0.00	0.56	0.00	0.00	71.22
Tesco Extra, Weston Favell District Centre	0.00	1.06	6.91	0.79	8.34	37.61	0.85	0.00	0.00	2.68	0.00	58.23
Lidl, Weston Favell District Centre	0.00	0.08	0.07	0.00	1.27	3.20	0.29	0.00	0.00	0.31	0.00	5.21
Sub-Total, Weston Favell District Centre	0.00	1.13	6.98	0.79	9.61	40.81	1.13	0.00	0.00	2.99	0.00	63.44
Other foodstores in Zone 6	0.00	0.05	0.23	0.27	1.29	6.06	0.14	0.00	0.00	0.14	0.00	8.17
Tesco Extra, Mere Way	0.00	6.82	0.25	4.30	3.73	0.25	44.75	0.00	0.92	4.73	0.00	65.75
Tesco Expresss, Butts Road	0.00	0.09	0.00	0.00	2.04	0.00	2.03	0.00	0.00	0.15	0.00	4.32
Other foodstores in Zone 7 (inc Netto Far Cotton)	0.00	0.14	0.13	0.00	0.23	0.00	4.60	0.00	0.00	0.00	0.00	5.10

Source:

Previous Tables

Cumulative Retail Impact Assessment - Convenience Goods

Scenario:

1

Baseline', assuming market shares indicated by WNRSU 2010 remain unchanged in 2014, with no new developments

Table 8

CONVENIENCE GOODS SALES & IMPACTS IN 2014

Store / Centre	Forecast Sales	Net Sales Area	Conv. Gds. Allocation		Conv. Gds. 'benchmark' sales density	Conv. Gds. 'benchmark' sales	Excess of forecast sales over 'benchmark' sales	
	(£m)	(sq m)	(%)	(sq m)	per sq m net	(£m)	(£m)	(%)
Sainsburys, Sixfields (as existing)	58.03	4,131	85	3,511	12,449	43.71	14.31	32.7%
Aldi, St James End	7.51	760	67	509	6,699	3.41	4.10	120.2%
Iceland, St James End	5.13	493	93	458	6,466	2.96	2.17	73.2%
Tesco Express, Bordeaux Close, Duston	2.30	174	95	165	12,787	2.11	0.19	8.8%
Other foodstores in Zone 4	5.46	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Morrisons, Victoria Promenade	34.20	3,609	75	2,707	16,188	43.82	-9.61	-21.9%
Asda, Kingsthorpe District Centre	21.89	1,480	90	1,332	13,378	17.82	4.07	22.8%
Waitrose, Kingsthorpe District Centre	21.22	2,433	86	2,092	11,065	23.15	-1.93	-8.3%
Sub-Total, Kingsthorpe District Centre	43.11	3,913	n/a	n/a	n/a	40.97	2.14	5.2%
Sainsburys, Northampton Town Centre	15.26	1,879	80	1,503	12,288	18.47	-3.21	-17.4%
Marks & Spencer, Northampton Town Centre	1.66	480	100	480	10,251	4.92	-3.26	-66.2%
Local Stores, Northampton Town Centre	4.11	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Sub-Total, Northampton Town Centre	21.03	n/a	n/a	n/a	n/a	23.39	-2.36	-10.1%
Co-op, Barry Road	2.71	604	85	513	8,873	4.56	-1.84	-40.5%
Other foodstores & local shops in Zone 5 (inc Netto)	17.38	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Morrisons, Kettering Road	71.22	3,345	75	2,509	16,188	40.61	30.61	75.4%
Tesco Extra, Weston Favell District Centre	58.23	7,295	67	4,888	12,787	62.50	-4.27	-6.8%
Lidl, Weston Favell District Centre	5.21	807	78	629	4,789	3.01	2.19	72.8%
Sub-Total, Weston Favell District Centre	63.44	8,102	n/a	n/a	n/a	65.51	-2.07	-3.2%
Other foodstores in Zone 6	8.17	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Tesco Extra, Mere Way (as existing)	65.75	5,733	67	3,841	12,787	49.12	16.63	33.9%
Tesco Expresss, Butts Road	4.32	244	95	232	12,787	2.96	1.35	45.7%
Other foodstores in Zone 7 (inc Netto Far Cotton)	5.10	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Foodstores outside Northampton	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TOTALS (stores with identified floorspace)	378.76					323.14	55.62	17.2%

Source:

Previous Tables

Notes:

Convenience Goods Space Allocations and Sales Densities by AECOM, based on Verdict Research Limited 2009/10 'benchmark' sales densities increased at 0.26 % pa as in WNRSU

Cumulative Retail Impact Assessment - Convenience Goods

Scenario: 2 Committed new foodstores open by 2014

Table 9
CONVENIENCE GOODS SALES & IMPACTS IN 2014

Store / Centre	Forecast Sales Pre-Impacts (Scenario 1)	Trade Draw to Committed Tesco Metro		Trade Draw to Committed Aldi		Trade Draw to Committed Netto extension		Total Trade Diverted	Cumulative Impact
	(£m)	(%)	(£m)	(%)	(£m)	(%)	(£m)	(£m)	(%)
Sainsburys, Sixfields (as existing)	58.03	6.0	0.45		0.00	3.0	0.09	0.53	-0.9%
Aldi, St James End	7.51	1.0	0.07	20.0	0.96	20.0	0.57	1.61	-21.4%
Iceland, St James End	5.13	1.0	0.07		0.00		0.00	0.07	-1.4%
Tesco Express, Bordeaux Close, Duston	2.30		0.00		0.00		0.00	0.00	0.0%
Other foodstores in Zone 4	5.46		0.00		0.00		0.00	0.00	0.0%
Morrisons, Victoria Promenade	34.20	15.0	1.11	5.0	0.24	12.5	0.36	1.71	-5.0%
Asda, Kingsthorpe District Centre	21.89	5.0	0.37	2.5	0.12	5.0	0.14	0.63	-2.9%
Waitrose, Kingsthorpe District Centre	21.22	5.0	0.37		0.00		0.00	0.37	-1.8%
Sub-Total, Kingsthorpe District Centre	43.11	10.0	0.74	2.5	0.12	5.0	0.14	1.01	-2.3%
Sainsburys, Northampton Town Centre	15.26	20.0	1.49		0.00		0.00	1.49	-9.7%
Marks & Spencer, Northampton Town Centre	1.66	4.0	0.30		0.00		0.00	0.30	-17.9%
Local Stores, Northampton Town Centre	4.11	2.5	0.19		0.00		0.00	0.19	-4.5%
Sub-Total, Northampton Town Centre	21.03	26.5	1.97	0.0	0.00	0.0	0.00	1.97	-9.4%
Co-op, Barry Road	2.71	1.0	0.07	5.0	0.24	1.0	0.03	0.34	-12.6%
Other foodstores & local shops in Zone 5 (inc Netto)	17.38	2.5	0.19	10.0	0.48	20.0	0.57	1.24	-7.1%
Morrisons, Kettering Road	71.22	10.0	0.74	7.5	0.36	5.0	0.14	1.25	-1.7%
Tesco Extra, Weston Favell District Centre	58.23	6.0	0.45	15.0	0.72	2.5	0.07	1.24	-2.1%
Lidl, Weston Favell District Centre	5.21		0.00	25.0	1.20	20.0	0.57	1.77	-34.0%
Sub-Total, Weston Favell District Centre	63.44	6.0	0.45	40.0	1.92	22.5	0.64	3.01	-4.7%
Other foodstores in Zone 6	8.17		0.00		0.00		0.00	0.00	0.0%
Tesco Extra, Mere Way (as existing)	65.75	10.0	0.74		0.00	6.0	0.17	0.91	-1.4%
Tesco Expresss, Butts Road	4.32		0.00		0.00		0.00	0.00	0.0%
Other foodstores in Zone 7 (inc Netto Far Cotton)	5.10	1.0	0.07	10.0	0.48	5.0	0.14	0.70	-13.7%
Foodstores elsewhere	n/a	10.0	0.74		0.00		0.00	0.74	n/a
Committed Tesco Metro, Northampton Town Centre		100.0	7.43						
Committed Aldi, Wellingborough Road				100.0	4.80				
Committed Netto extension, Far Cotton						100.0	2.86		

Source:

Previous Tables
AECOM for Trade Draws

Notes:

Negative impacts indicate reduction in sales

Cumulative Retail Impact Assessment - Convenience Goods

Scenario: 3 Committed new foodstores plus Sainsburys extension at Sixfields open by 2014

Table 10
CONVENIENCE GOODS SALES & IMPACTS IN 2014

Store / Centre	Forecast Sales Pre-Impacts (Scenario 1)	Post Impact Sales in Scenario 2	Trade Draw to Sainsburys extension		Trade Diverted	Impact on Scenario 2 Sales	Cumulative Impact on Scenario 1 Sales
	(£m)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Sainsburys, Sixfields (as existing)	58.03	57.49	40.0	4.58	4.58	-8.0%	-8.8%
Aldi, St James End	7.51	5.90	3.0	0.34	0.34	-5.8%	-26.0%
Iceland, St James End	5.13	5.06	1.5	0.17	0.17	-3.4%	-4.8%
Tesco Express, Bordeaux Close, Duston	2.30	2.30	1.0	0.11	0.11	-5.0%	-5.0%
Other foodstores in Zone 4	5.46	5.46	1.0	0.11	0.11	-2.1%	-2.1%
Morrisons, Victoria Promenade	34.20	32.49	11.0	1.26	1.26	-3.9%	-8.7%
Asda, Kingsthorpe District Centre	21.89	21.26	3.5	0.40	0.40	-1.9%	-4.7%
Waitrose, Kingsthorpe District Centre	21.22	20.85	4.0	0.46	0.46	-2.2%	-3.9%
Sub-Total, Kingsthorpe District Centre	43.11	42.10	7.5	0.86	0.86	-2.0%	-4.3%
Sainsburys, Northampton Town Centre	15.26	13.77	7.5	0.86	0.86	-6.2%	-15.4%
Marks & Spencer, Northampton Town Centre	1.66	1.37		0.00	0.00	0.0%	-17.9%
Local Stores, Northampton Town Centre	4.11	3.92		0.00	0.00	0.0%	-4.5%
Sub-Total, Northampton Town Centre	21.03	19.06	7.5	0.86	0.86	-4.5%	-13.4%
Co-op, Barry Road	2.71	2.37		0.00	0.00	0.0%	-12.6%
Other foodstores & local shops in Zone 5 (inc Netto)	17.38	16.14		0.00	0.00	0.0%	-7.1%
Morrisons, Kettering Road	71.22	69.98	5.0	0.57	0.57	-0.8%	-2.6%
Tesco Extra, Weston Favell District Centre	58.23	56.99		0.00	0.00	0.0%	-2.1%
Lidl, Weston Favell District Centre	5.21	3.44		0.00	0.00	0.0%	-34.0%
Sub-Total, Weston Favell District Centre	63.44	60.43	0.00	0.00	0.00	0.0%	-4.7%
Other foodstores in Zone 6	8.17	8.17		0.00	0.00	0.0%	0.0%
Tesco Extra, Mere Way (as existing)	65.75	64.83	17.5	2.00	2.00	-3.1%	-4.4%
Tesco Expresss, Butts Road	4.32	4.32		0.00	0.00	0.0%	0.0%
Other foodstores in Zone 7 (inc Netto Far Cotton)	5.10	4.40		0.00	0.00	0.0%	-13.7%
Foodstores elsewhere	n/a	n/a	2.5	0.29	0.29	n/a	n/a
Committed Tesco Metro, Northampton Town Centre		7.43	2.5	0.29	0.29	-3.9%	-3.9%
Committed Aldi, Wellingborough Road		4.80		0.00	0.00	0.0%	0.0%
Committed Netto extension, Far Cotton		2.86		0.00	0.00	0.0%	0.0%
Sub-Total Committed Developments		15.09	2.5	0.29	0.29	-1.9%	-1.9%
Proposed Sainsburys extension, Sixfields			100.0	11.45	11.45		

Source:

Previous Tables

AECOM for Trade Draws

Notes:

Negative impacts indicate reduction in sales

Cumulative Retail Impact Assessment - Convenience Goods

Scenario:

4

Committed new foodstores, plus Sainsburys extension at Sixfields and Nene Valley Retail Park superstore open by 2014

Table 11

CONVENIENCE GOODS SALES & IMPACTS IN 2014

Store / Centre	Forecast Sales Pre-Impacts (Scenario 1)	Post Impact Sales in Scenario 3	Trade Draw to Nene Valley Retail Park superstore		Trade Diverted	Impact on Scenario 3 Sales	Cumulative Impact on Scenario 1 Sales
	(£m)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Sainsburys, Sixfields (as existing)	58.03	52.91	15.0	6.84	6.84	-12.9%	-20.6%
Aldi, St James End	7.51	5.56	2.5	1.14	1.14	-20.5%	-41.1%
Iceland, St James End	5.13	4.89	1.0	0.46	0.46	-9.3%	-13.7%
Tesco Express, Bordeaux Close, Duston	2.30	2.19		0.00	0.00	0.0%	-5.0%
Other foodstores in Zone 4	5.46	5.34		0.00	0.00	0.0%	-2.1%
Morrisons, Victoria Promenade	34.20	31.23	20.0	9.12	9.12	-29.2%	-35.4%
Asda, Kingsthorpe District Centre	21.89	20.86	7.5	3.42	3.42	-16.4%	-20.4%
Waitrose, Kingsthorpe District Centre	21.22	20.39	2.5	1.14	1.14	-5.6%	-9.3%
Sub-Total, Kingsthorpe District Centre	43.11	41.25	10.0	4.56	4.56	-11.1%	-14.9%
Sainsburys, Northampton Town Centre	15.26	12.92	2.5	1.14	1.14	-8.8%	-22.8%
Marks & Spencer, Northampton Town Centre	1.66	1.37		0.00	0.00	0.0%	-17.9%
Local Stores, Northampton Town Centre	4.11	3.92		0.00	0.00	0.0%	-4.5%
Sub-Total, Northampton Town Centre	21.03	18.20	2.5	1.14	1.14	-6.3%	-18.9%
Co-op, Barry Road	2.71	2.37	0.5	0.23	0.23	-9.6%	-21.1%
Other foodstores & local shops in Zone 5 (inc Netto)	17.38	16.14	1.0	0.46	0.46	-2.8%	-9.7%
Morrisons, Kettering Road	71.22	69.41	10.0	4.56	4.56	-6.6%	-9.0%
Tesco Extra, Weston Favell District Centre	58.23	56.99	5.0	2.28	2.28	-4.0%	-6.0%
Lidl, Weston Favell District Centre	5.21	3.44	0.5	0.23	0.23	-6.6%	-38.4%
Sub-Total, Weston Favell District Centre	63.44	60.43	5.50	2.51	2.51	-4.2%	-8.7%
Other foodstores in Zone 6	8.17	8.17		0.00	0.00	0.0%	0.0%
Tesco Extra, Mere Way (as existing)	65.75	62.83	17.5	7.98	7.98	-12.7%	-16.6%
Tesco Expresss, Butts Road	4.32	4.32		0.00	0.00	0.0%	0.0%
Other foodstores in Zone 7 (inc Netto Far Cotton)	5.10	4.40	1.5	0.68	0.68	-15.5%	-27.1%
Foodstores elsewhere	n/a	n/a	7.5	3.42	3.42	n/a	n/a
Committed Tesco Metro, Northampton Town Centre		7.15	1.5	0.68	0.68	-9.6%	-13.1%
Committed Aldi, Wellingborough Road		4.80	0.5	0.23	0.23	-4.8%	-4.8%
Committed Netto extension, Far Cotton		2.86	1.0	0.46	0.46	-15.9%	-15.9%
Sub-Total Committed Developments		14.81	3.0	1.37	1.37	-9.2%	-11.0%
Proposed Sainsburys extension, Sixfields		11.45	2.5	1.14	1.14	-10.0%	-10.0%
Proposed Nene Valley Retail Park superstore			100.0	45.62	45.62		

Source:

Previous Tables

AECOM for Trade Draws

Notes:

Negative impacts indicate reduction in sales

Cumulative Retail Impact Assessment - Convenience Goods

Scenario:

5

Committed new foodstores, plus Sainsburys extension at Sixfields, Nene Valley Retail Park superstore and Tesco extension at Mere Way open by 2014

Table 12

CONVENIENCE GOODS SALES & IMPACTS IN 2014

Store / Centre	Forecast Sales Pre-Impacts (Scenario 1)	Post Impact Sales in Scenario 4	Trade Draw to Tesco superstore extension, Mere Way		Trade Diverted	Impact on Scenario 4 Sales	Cumulative Impact on Scenario 1 Sales
	(£m)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Sainsburys, Sixfields (as existing)	58.03	46.07	12.5	1.01	1.01	-2.2%	-22.3%
Aldi, St James End	7.51	4.42		0.00	0.00	0.0%	-41.1%
Iceland, St James End	5.13	4.43		0.00	0.00	0.0%	-13.7%
Tesco Express, Bordeaux Close, Duston	2.30	2.19		0.00	0.00	0.0%	-5.0%
Other foodstores in Zone 4	5.46	5.34		0.00	0.00	0.0%	-2.1%
Morrisons, Victoria Promenade	34.20	22.11	15.0	1.21	1.21	-5.5%	-38.9%
Asda, Kingsthorpe District Centre	21.89	17.43	2.0	0.16	0.16	-0.9%	-21.1%
Waitrose, Kingsthorpe District Centre	21.22	19.25		0.00	0.00	0.0%	-9.3%
Sub-Total, Kingsthorpe District Centre	43.11	36.68	2.0	0.16	0.16	-0.4%	-15.3%
Sainsburys, Northampton Town Centre	15.26	11.78	2.0	0.16	0.16	-1.4%	-23.9%
Marks & Spencer, Northampton Town Centre	1.66	1.37		0.00	0.00	0.0%	-17.9%
Local Stores, Northampton Town Centre	4.11	3.92		0.00	0.00	0.0%	-4.5%
Sub-Total, Northampton Town Centre	21.03	17.06	2.0	0.16	0.16	-0.9%	-19.6%
Co-op, Barry Road	2.71	2.14		0.00	0.00	0.0%	-21.1%
Other foodstores & local shops in Zone 5 (inc Netto)	17.38	15.69		0.00	0.00	0.0%	-9.7%
Morrisons, Kettering Road	71.22	64.84	4.0	0.32	0.32	-0.5%	-9.4%
Tesco Extra, Weston Favell District Centre	58.23	54.71	4.5	0.36	0.36	-0.7%	-6.7%
Lidl, Weston Favell District Centre	5.21	3.21		0.00	0.00	0.0%	-38.4%
Sub-Total, Weston Favell District Centre	63.44	57.92	4.5	0.36	0.36	-0.6%	-9.3%
Other foodstores in Zone 6	8.17	8.17		0.00	0.00	0.0%	0.0%
Tesco Extra, Mere Way (as existing)	65.75	54.85	30.0	2.42	2.42	-4.4%	-20.3%
Tesco Expresss, Butts Road	4.32	4.32		0.00	0.00	0.0%	0.0%
Other foodstores in Zone 7 (inc Netto Far Cotton)	5.10	3.72	2.0	0.16	0.16	-4.3%	-30.3%
Foodstores elsewhere	n/a	n/a	1.5	0.12	0.12	n/a	n/a
Committed Tesco Metro, Northampton Town Centre		6.46	3.0	0.24	0.24	-3.7%	-16.3%
Committed Aldi, Wellingborough Road		4.57		0.00	0.00	0.0%	-4.8%
Committed Netto extension, Far Cotton		2.41	1.0	0.08	0.08	-3.4%	-18.8%
Sub-Total Committed Developments		13.44	4.0	0.32	0.32	-2.4%	-13.1%
Proposed Sainsburys extension, Sixfields		10.31	2.5	0.20	0.20	-2.0%	-11.7%
Proposed Nene Valley Retail Park superstore		45.62	20.0	1.61	1.61	-3.5%	-3.5%
Proposed Tesco Extension, Mere Way			100.0	8.07	8.07		

Source:

Previous Tables

AECOM for Trade Draws

Notes:

Negative impacts indicate reduction in sales

The impact of the Tesco extension at Mere Way on the existing Tesco superstore there represents relief of current overtrading in that store.

Cumulative Retail Impact Assessment - Convenience Goods

Scenario:

6

Committed new foodstores, plus Sainsburys extension at Sixfields, Nene Valley Retail Park superstore, Tesco extension at Mere Way & new superstore at Barrack Road open by 2014

Table 13

CONVENIENCE GOODS SALES & IMPACTS IN 2014

Store / Centre	Forecast Sales Pre-Impacts (Scenario 1)	Post Impact Sales in Scenario 5	Trade Draw to new superstore at Barrack Road		Trade Diverted	Impact on Scenario 5 Sales	Cumulative Impact on Scenario 1 Sales
	(£m)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Sainsburys, Sixfields (as existing)	58.03	45.06	10.0	4.81	4.81	-10.7%	-30.6%
Aldi, St James End	7.51	4.42	1.5	0.72	0.72	-16.3%	-50.8%
Iceland, St James End	5.13	4.43	1.0	0.48	0.48	-10.9%	-23.0%
Tesco Express, Bordeaux Close, Duston	2.30	2.19		0.00	0.00	0.0%	-5.0%
Other foodstores in Zone 4	5.46	5.34		0.00	0.00	0.0%	-2.1%
Morrisons, Victoria Promenade	34.20	20.90	12.5	6.01	6.01	-28.8%	-56.5%
Asda, Kingsthorpe District Centre	21.89	17.27	10.0	4.81	4.81	-27.8%	-43.1%
Waitrose, Kingsthorpe District Centre	21.22	19.25	5.0	2.40	2.40	-12.5%	-20.6%
Sub-Total, Kingsthorpe District Centre	43.11	36.52	15.0	7.21	7.21	-19.8%	-32.0%
Sainsburys, Northampton Town Centre	15.26	11.61	2.5	1.20	1.20	-10.4%	-31.8%
Marks & Spencer, Northampton Town Centre	1.66	1.37		0.00	0.00	0.0%	-17.9%
Local Stores, Northampton Town Centre	4.11	3.92		0.00	0.00	0.0%	-4.5%
Sub-Total, Northampton Town Centre	21.03	16.90	2.5	1.20	1.20	-7.1%	-25.4%
Co-op, Barry Road	2.71	2.14	1.0	0.48	0.48	-22.5%	-38.8%
Other foodstores & local shops in Zone 5 (inc Netto)	17.38	15.69	2.5	1.20	1.20	-7.7%	-16.7%
Morrisons, Kettering Road	71.22	64.52	15.0	7.21	7.21	-11.2%	-19.5%
Tesco Extra, Weston Favell District Centre	58.23	54.35	5.0	2.40	2.40	-4.4%	-10.8%
Lidl, Weston Favell District Centre	5.21	3.21		0.00	0.00	0.0%	-38.4%
Sub-Total, Weston Favell District Centre	63.44	57.56	5.0	2.40	2.40	-4.2%	-13.1%
Other foodstores in Zone 6	8.17	8.17		0.00	0.00	0.0%	0.0%
Tesco Extra, Mere Way (as existing)	65.75	52.43	8.5	4.09	4.09	-7.8%	-26.5%
Tesco Expresss, Butts Road	4.32	4.32		0.00	0.00	0.0%	0.0%
Other foodstores in Zone 7 (inc Netto Far Cotton)	5.10	3.56		0.00	0.00	0.0%	-30.3%
Foodstores elsewhere	n/a	n/a	7.5	3.61	3.61	n/a	n/a
Committed Tesco Metro, Northampton Town Centre		6.22	1.5	0.72	0.72	-11.6%	-26.0%
Committed Aldi, Wellingborough Road		4.57		0.00	0.00	0.0%	-4.8%
Committed Netto extension, Far Cotton		2.33		0.00	0.00	0.0%	-18.8%
Sub-Total Committed Developments		13.12	1.5	0.72	0.72	-5.5%	-17.9%
Proposed Sainsburys extension, Sixfields		10.11	2.5	1.20	1.20	-11.9%	-22.2%
Proposed Nene Valley Retail Park superstore		44.00	12.5	6.01	6.01	-13.7%	-16.7%
Proposed Tesco Extension, Mere Way		8.07	1.5	0.72	0.72	-8.9%	-8.9%
Proposed new superstore at Barrack Road			100.0	48.10	48.10		

Source:

Previous Tables

AECOM for Trade Draws

Notes:

Negative impacts indicate reduction in sales

Cumulative Retail Impact Assessment - Convenience Goods

Committed new foodstores, plus Sainsburys extension at Sixfields, Nene Valley Retail Park superstore, Tesco extension at Mere Way, new superstore at Barrack Road & potential Waitrose at Wyevale Garden Centre open by 2014

Scenario: 7

Table 14
CONVENIENCE GOODS SALES & IMPACTS IN 2014

Store / Centre	Forecast Sales Pre-Impacts (Scenario 1)	Post Impact Sales in Scenario 6	Trade Draw to new Waitrose supermarket at Wyevale Garden Centre		Trade Diverted	Impact on Scenario 6 Sales	Cumulative Impact on Scenario 1 Sales
	(£m)	(£m)	(%)	(£m)		(%)	(%)
Sainsburys, Sixfields (as existing)	58.03	40.25	10.0	1.36	1.36	-3.4%	-33.0%
Aldi, St James End	7.51	3.70		0.00	0.00	0.0%	-50.8%
Iceland, St James End	5.13	3.95		0.00	0.00	0.0%	-23.0%
Tesco Express, Bordeaux Close, Duston	2.30	2.19		0.00	0.00	0.0%	-5.0%
Other foodstores in Zone 4	5.46	5.34		0.00	0.00	0.0%	-2.1%
Morrisons, Victoria Promenade	34.20	14.89	10.0	1.36	1.36	-9.2%	-60.5%
Asda, Kingsthorpe District Centre	21.89	12.46	2.5	0.34	0.34	-2.7%	-44.6%
Waitrose, Kingsthorpe District Centre	21.22	16.84	15.0	2.05	2.05	-12.1%	-30.3%
Sub-Total, Kingsthorpe District Centre	43.11	29.31	17.5	2.39	2.39	-8.1%	-37.6%
Sainsburys, Northampton Town Centre	15.26	10.41	2.0	0.27	0.27	-2.6%	-33.6%
Marks & Spencer, Northampton Town Centre	1.66	1.37	1.0	0.14	0.14	-10.0%	-26.1%
Local Stores, Northampton Town Centre	4.11	3.92		0.00	0.00	0.0%	-4.5%
Sub-Total, Northampton Town Centre	21.03	15.70	3.0	0.41	0.41	-2.6%	-27.3%
Co-op, Barry Road	2.71	1.66		0.00	0.00	0.0%	-38.8%
Other foodstores & local shops in Zone 5 (inc Netto)	17.38	14.48		0.00	0.00	0.0%	-16.7%
Morrisons, Kettering Road	71.22	57.31	2.5	0.34	0.34	-0.6%	-20.0%
Tesco Extra, Weston Favell District Centre	58.23	51.95	2.5	0.34	0.34	-0.7%	-11.4%
Lidl, Weston Favell District Centre	5.21	3.21		0.00	0.00	0.0%	-38.4%
Sub-Total, Weston Favell District Centre	63.44	55.15	2.5	0.34	0.34	-0.6%	-13.6%
Other foodstores in Zone 6	8.17	8.17		0.00	0.00	0.0%	0.0%
Tesco Extra, Mere Way (as existing)	65.75	48.34	17.5	2.39	2.39	-4.9%	-30.1%
Tesco Expresss, Butts Road	4.32	4.32	2.0	0.27	0.27	-6.3%	-6.3%
Other foodstores in Zone 7 (inc Netto Far Cotton)	5.10	3.56	3.5	0.48	0.48	-13.4%	-39.6%
Foodstores elsewhere	n/a	n/a	5.0	0.68	0.68	n/a	n/a
Committed Tesco Metro, Northampton Town Centre		5.50	1.0	0.14	0.14	-2.5%	-27.9%
Committed Aldi, Wellingborough Road		4.57		0.00	0.00	0.0%	-4.8%
Committed Netto extension, Far Cotton		2.33	0.5	0.07	0.07	-2.9%	-21.1%
Sub-Total Committed Developments		12.40	1.5	0.20	0.20	-1.7%	-19.2%
Proposed Sainsburys extension, Sixfields		8.90	2.5	0.34	0.34	-3.8%	-25.2%
Proposed Nene Valley Retail Park superstore		37.99	12.5	1.71	1.71	-4.5%	-20.5%
Proposed Tesco Extension, Mere Way		7.35	2.5	0.34	0.34	-4.6%	-13.2%
Proposed new superstore at Barrack Road		48.10	7.5	1.02	1.02	-2.1%	-2.1%
Proposed new Waitrose supermarket			100.0	13.64	13.64		

Source:

Previous Tables

AECOM for Trade Draws

Notes:

Negative impacts indicate reduction in sales

Cumulative Retail Impact Assessment - Convenience Goods

Scenario: 8 Committed new foodstores plus Tesco extension at Mere Way open by 2014

Table 15
CONVENIENCE GOODS SALES & IMPACTS IN 2014

Store / Centre	Forecast Sales Pre-Impacts (Scenario 1)	Post Impact Sales in Scenario 2	Trade Draw to Tesco extension		Trade Diverted	Impact on Scenario 2 Sales	Cumulative Impact on Scenario 1 Sales
	(£m)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Sainsburys, Sixfields (as existing)	58.03	57.49	16.5	1.33	1.33	-2.3%	-3.2%
Aldi, St James End	7.51	5.90	1.5	0.12	0.12	-2.1%	-23.0%
Iceland, St James End	5.13	5.06	0.5	0.04	0.04	-0.8%	-2.2%
Tesco Express, Bordeaux Close, Duston	2.30	2.30		0.00	0.00	0.0%	0.0%
Other foodstores in Zone 4	5.46	5.46		0.00	0.00	0.0%	0.0%
Morrisons, Victoria Promenade	34.20	32.49	12.5	1.01	1.01	-3.1%	-8.0%
Asda, Kingsthorpe District Centre	21.89	21.26	1.5	0.12	0.12	-0.6%	-3.5%
Waitrose, Kingsthorpe District Centre	21.22	20.85	1.0	0.08	0.08	-0.4%	-2.1%
Sub-Total, Kingsthorpe District Centre	43.11	42.10	2.50	0.20	0.20	-0.5%	-2.8%
Sainsburys, Northampton Town Centre	15.26	13.77	5.0	0.40	0.40	-2.9%	-12.4%
Marks & Spencer, Northampton Town Centre	1.66	1.37		0.00	0.00	0.0%	-17.9%
Local Stores, Northampton Town Centre	4.11	3.92		0.00	0.00	0.0%	-4.5%
Sub-Total, Northampton Town Centre	21.03	19.06	5.00	0.40	0.40	-2.1%	-11.3%
Co-op, Barry Road	2.71	2.37		0.00	0.00	0.0%	-12.6%
Other foodstores & local shops in Zone 5 (inc Netto)	17.38	16.14		0.00	0.00	0.0%	-7.1%
Morrisons, Kettering Road	71.22	69.98	4.0	0.32	0.32	-0.5%	-2.2%
Tesco Extra, Weston Favell District Centre	58.23	56.99	7.5	0.61	0.61	-1.1%	-3.2%
Lidl, Weston Favell District Centre	5.21	3.44		0.00	0.00	0.0%	-34.0%
Sub-Total, Weston Favell District Centre	63.44	60.43	7.50	0.61	0.61	-1.0%	-5.7%
Other foodstores in Zone 6	8.17	8.17		0.00	0.00	0.0%	0.0%
Tesco Extra, Mere Way (as existing)	65.75	64.83	40.0	3.23	3.23	-5.0%	-6.3%
Tesco Express, Butts Road	4.32	4.32	1.0	0.08	0.08	-1.9%	-1.9%
Other foodstores in Zone 7 (inc Netto Far Cotton)	5.10	4.40	3.0	0.24	0.24	-5.5%	-18.4%
Foodstores elsewhere	n/a	n/a	2.5	0.20	0.20	n/a	n/a
Committed Tesco Metro, Northampton Town Centre		7.43	2.5	0.20	0.20	-2.7%	-2.7%
Committed Aldi, Wellingborough Road		4.80		0.00	0.00	0.0%	0.0%
Committed Netto extension, Far Cotton		2.86	1.0	0.08	0.08	-2.8%	-2.8%
Sub-Total Committed Developments		15.09	3.50	0.28	0.28	-1.9%	-1.9%
Proposed Tesco extension, Mere Way			100.0	8.07			

Source:

Previous Tables

AECOM for Trade Draws

Notes:

Negative impacts indicate reduction in sales

The impact of the Tesco extension on the existing Tesco superstores represents relief of current overtrading in that store.

Cumulative Retail Impact Assessment - Convenience Goods

Scenario:

9

Committed new foodstores, plus Sainsburys extension at Sixfields & Tesco extension at Mere Way, open by 2014

Table 16

CONVENIENCE GOODS SALES & IMPACTS IN 2014

Store / Centre	Forecast Sales Pre-Impacts (Scenario 1)	Post Impact Sales in Scenario 2	Trade Draw to Sainsburys extension		Trade Draw to Tesco extension		Total Trade Diverted	Impact on Scenario 2 Sales	Cumulative Impact on Scenario 1 Sales
	(£m)	(£m)	(%)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Sainsburys, Sixfields (as existing)	58.03	57.49	40.0	4.58	16.5	1.33	5.91	-10.3%	-11.1%
Aldi, St James End	7.51	5.90	2.5	0.29	1.5	0.12	0.41	-6.9%	-26.8%
Iceland, St James End	5.13	5.06	1.5	0.17	0.5	0.04	0.21	-4.2%	-5.6%
Tesco Express, Bordeaux Close, Duston	2.30	2.30	0.5	0.06		0.00	0.06	-2.5%	-2.5%
Other foodstores in Zone 4	5.46	5.46	1.0	0.11		0.00	0.11	-2.1%	-2.1%
Morrisons, Victoria Promenade	34.20	32.49	10.0	1.14	12.5	1.01	2.15	-6.6%	-11.3%
Asda, Kingsthorpe District Centre	21.89	21.26	3.5	0.40	1.5	0.12	0.52	-2.5%	-5.3%
Waitrose, Kingsthorpe District Centre	21.22	20.85	4.0	0.46	1.0	0.08	0.54	-2.6%	-4.3%
Sub-Total, Kingsthorpe District Centre	43.11	42.10	7.5	0.86	2.50	0.20	1.06	-2.5%	-4.8%
Sainsburys, Northampton Town Centre	15.26	13.77	10.0	1.14	2.5	0.20	1.35	-9.8%	-18.6%
Marks & Spencer, Northampton Town Centre	1.66	1.37		0.00		0.00	0.00	0.0%	-17.9%
Local Stores, Northampton Town Centre	4.11	3.92		0.00		0.00	0.00	0.0%	-4.5%
Sub-Total, Northampton Town Centre	21.03	19.06	10.0	1.14	2.50	0.20	1.35	-7.1%	-15.8%
Co-op, Barry Road	2.71	2.37		0.00		0.00	0.00	0.0%	-12.6%
Other foodstores & local shops in Zone 5 (inc Netto)	17.38	16.14		0.00		0.00	0.00	0.0%	-7.1%
Morrisons, Kettering Road	71.22	69.98	5.0	0.57	4.0	0.32	0.90	-1.3%	-3.0%
Tesco Extra, Weston Favell District Centre	58.23	56.99		0.00	7.5	0.61	0.61	-1.1%	-3.2%
Lidl, Weston Favell District Centre	5.21	3.44		0.00		0.00	0.00	0.0%	-34.0%
Sub-Total, Weston Favell District Centre	63.44	60.43	0.00	0.00	7.50	0.61	0.61	-1.0%	-5.7%
Other foodstores in Zone 6	8.17	8.17		0.00		0.00	0.00	0.0%	0.0%
Tesco Extra, Mere Way (as existing)	65.75	64.83	17.0	1.95	40.0	3.23	5.17	-8.0%	-9.3%
Tesco Express, Butts Road	4.32	4.32		0.00	1.0	0.08	0.08	-1.9%	-1.9%
Other foodstores in Zone 7 (inc Netto Far Cotton)	5.10	4.40		0.00	3.0	0.24	0.24	-5.5%	-18.4%
Foodstores elsewhere	n/a	n/a	2.5	0.29	2.5	0.20	0.49	n/a	n/a
Committed Tesco Metro, Northampton Town Centre		7.43	2.5	0.29	5.0	0.40	0.69	-9.3%	-9.3%
Committed Aldi, Wellingborough Road		4.80		0.00		0.00	0.00	0.0%	0.0%
Committed Netto extension, Far Cotton		2.86		0.00	1.0	0.08	0.08	-2.8%	-2.8%
Sub-Total Committed Developments		15.09	2.5	0.29	6.00	0.48	0.77	-5.1%	-5.1%
Proposed Sainsburys extension, Sixfields			100.0	11.45			19.52		
Proposed Tesco extension, Mere Way					100.00	8.07			

Source:

Previous Tables

AECOM for Trade Draws

Notes:

Negative impacts indicate reduction in sales

The impact of the Sainsburys and Tesco extensions on those existing Sainsburys and Tesco superstores represents relief of current overtrading in those stores.

Cumulative Retail Impact Assessment - Convenience Goods

Summary

Scenarios 1 to 9

Table 17

CONVENIENCE GOODS SALES & IMPACTS IN 2014

Store / Centre	Forecast Sales Pre-Impacts (Scenarios 1	Impacts Scenario 2	Cumulative Impacts Scenario 3	Cumulative Impacts Scenario 4	Cumulative Impacts Scenario 5	Cumulative Impacts Scenario 6	Cumulative Impacts Scenario 7	Cumulative Impacts Scenario 8	Cumulative Impacts Scenario 9	Scenario 7 comparison with 'benchmark'	Scenario 9 comparison with 'benchmark'
	(£m)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
Sainsburys, Sixfields (as existing)	58.03	-1%	-9%	-21%	-22%	-31%	-33%	-3%	-11%	89%	118%
Aldi, St James End	7.51	-21%	-26%	-41%	-41%	-51%	-51%	-23%	-27%	108%	161%
Iceland, St James End	5.13	-1%	-5%	-14%	-14%	-23%	-23%	-2%	-6%	133%	164%
Tesco Express, Bordeaux Close, Duston	2.30	0%	-5%	-5%	-5%	-5%	-5%	0%	-2%	103%	106%
Other foodstores in Zone 4	5.46	0%	-2%	-2%	-2%	-2%	-2%	0%	-2%	n/a	n/a
Morrisons, Victoria Promenade	34.20	-5%	-9%	-35%	-39%	-56%	-60%	-8%	-11%	31%	69%
Asda, Kingsthorpe District Centre	21.89	-3%	-5%	-20%	-21%	-43%	-45%	-3%	-5%	68%	116%
Waitrose, Kingsthorpe District Centre	21.22	-2%	-4%	-9%	-9%	-21%	-30%	-2%	-4%	64%	88%
Sub-Total, Kingsthorpe District Centre	43.11	-2%	-4%	-15%	-15%	-32%	-38%	-3%	-5%	66%	100%
Sainsburys, Northampton Town Centre	15.26	-10%	-15%	-23%	-24%	-32%	-34%	-12%	-19%	55%	67%
Marks & Spencer, Northampton Town Centre	1.66	-18%	-18%	-18%	-18%	-18%	-26%	-18%	-18%	25%	28%
Local Stores, Northampton Town Centre	4.11	-5%	-5%	-5%	-5%	-5%	-5%	-5%	-5%	n/a	n/a
Sub-Total, Northampton Town Centre	21.03	-9%	-13%	-19%	-20%	-25%	-27%	-11%	-16%	65%	76%
Co-op, Barry Road	2.71	-13%	-13%	-21%	-21%	-39%	-39%	-13%	-13%	36%	52%
Other foodstores & local shops in Zone 5 (inc Netto)	17.38	-7%	-7%	-10%	-10%	-17%	-17%	-7%	-7%	n/a	n/a
Morrisons, Kettering Road	71.22	-2%	-3%	-9%	-9%	-20%	-20%	-2%	-3%	140%	170%
Tesco Extra, Weston Favell District Centre	58.23	-2%	-2%	-6%	-7%	-11%	-11%	-3%	-3%	83%	90%
Lidl, Weston Favell District Centre	5.21	-34%	-34%	-38%	-38%	-38%	-34%	-34%	-34%	106%	114%
Sub-Total, Weston Favell District Centre	63.44	-5%	-5%	-9%	-9%	-13%	-14%	-6%	-6%	84%	91%
Other foodstores in Zone 6	8.17	0%	0%	0%	0%	0%	0%	0%	0%	n/a	n/a
Tesco Extra, Mere Way (as existing)	65.75	-1%	-4%	-17%	-20%	-26%	-30%	-6%	-9%	94%	121%
Tesco Expresss, Butts Road	4.32	0%	0%	0%	0%	0%	-6%	-2%	-2%	136%	143%
Other foodstores in Zone 7 (inc Netto Far Cotton)	5.10	-14%	-14%	-27%	-30%	-30%	-40%	-18%	-18%	n/a	n/a
Foodstores elsewhere	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a		
Committed Tesco Metro, Northampton Town Centre*	7.43		-4%	-13%	-16%	-26%	-28%	-3%	-9%	72%	91%
Committed Aldi, Wellingborough Road*	4.80		0%	-5%	-5%	-5%	-5%	0%	0%	95%	100%
Committed Netto extension, Far Cotton*	2.86		0%	-16%	-19%	-19%	-21%	-3%	-3%	79%	97%
Sub-Total Committed Developments			-2%	-11%	-13%	-18%	-19%	-2%	-5%	81%	95%
Proposed Sainsburys extension, Sixfields				-10%	-12%	-22%	-25%				
Proposed Nene Valley Retail Park superstore					-4%	-17%	-20%				
Proposed Tesco Extension, Mere Way						-9%	-13%				
Proposed new superstore at Barrack Road							-2%				
Proposed new Waitrose supermarket											

Source:

Previous Tables
AECOM for Trade Draws

Notes:

Negative impacts indicate reduction in sales
The Scenario 7 & 9 comparison with 'benchmark' sales indicates the degree to which the sales after the cumulative impacts of Scenarios 7& 9 would be above or below the 'benchmark' levels

Comparison Goods Market Shares, and Sales in Existing Centres & Retail Parks

Table 18

COMPARISON GOODS MARKET SHARES OF EXISTING CENTRES & RETAIL PARKS IN 2010

Store / Centre	Catchment Zone										
	1 (%)	2 (%)	3 (%)	4 (%)	5 (%)	6 (%)	7 (%)	8 (%)	9 (%)	10 (%)	11 (%)
Northampton Town Centre	1.97	29.86	23.40	39.66	39.89	22.81	33.69	10.87	12.90	31.46	1.85
Kingsthorpe District Centre	0.97	1.51	0.54	0.58	5.04	1.92	0.40	0.00	0.44	0.81	0.00
Weston Favell District Centre	0.10	1.15	9.68	0.14	4.40	18.58	0.58	0.31	0.00	5.87	0.00
Out-of-centre Retail Parks & superstores	3.56	31.34	26.93	44.64	35.60	38.59	47.84	22.46	20.83	35.47	4.65
Elsewhere	93.40	36.14	39.45	14.98	15.07	18.10	17.49	66.36	65.83	26.39	93.50

Source:

WNRSU

Notes:

Elsewhere includes locations in Northampton other than those specifically listed in the table

Table 19

COMPARISON GOODS SALES IN EXISTING STORES & CENTRES IN 2010

Store / Centre	Catchment Zone											Inflow from elsewhere (£m)	Totals (£m)
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)		
Northampton Town Centre	1.48	20.08	16.15	37.48	68.97	36.13	40.50	15.05	9.52	11.13	2.62	50.00	309.11
Kingsthorpe District Centre	0.73	1.02	0.37	0.55	8.71	3.04	0.48	0.00	0.32	0.29	0.00		15.51
Weston Favell District Centre	0.08	0.77	6.68	0.13	7.61	29.43	0.70	0.43	0.00	2.08	0.00	5.00	52.90
Out-of-centre Retail Parks & superstores	2.68	21.07	18.58	42.18	61.56	61.12	57.51	31.11	15.38	12.55	6.59	26.40	356.73

Source:

Previous Tables

Notes:

Inflow from WNRSU, with apportionment between the town centre and out-of-centre locations by AECOM

Table 20

COMPARISON GOODS SALES IN EXISTING STORES & CENTRES IN 2014

Scenario:

1

Store / Centre	Catchment Zone											Inflow from elsewhere (£m)	Totals (£m)
	1 (£m)	2 (£m)	3 (£m)	4 (£m)	5 (£m)	6 (£m)	7 (£m)	8 (£m)	9 (£m)	10 (£m)	11 (£m)		
Northampton Town Centre	1.69	22.68	18.29	43.27	78.65	41.20	46.54	16.94	10.99	12.77	2.99	57.00	353.03
Kingsthorpe District Centre	0.83	1.15	0.42	0.63	9.94	3.47	0.55	0.00	0.37	0.33	0.00		17.70
Weston Favell District Centre	0.09	0.87	7.57	0.15	8.68	33.56	0.80	0.48	0.00	2.38	0.00	6.00	60.58
Out-of-centre Retail Parks & superstores	3.06	23.80	21.05	48.71	70.19	69.71	66.08	35.00	17.75	14.40	7.53	30.39	407.68

Source:

Previous Tables

Notes:

Inflow from WNRSU, with apportionment between the town centre and out-of-centre locations by AECOM

Cumulative Retail Impact Assessment - Comparison Goods

Scenario 1 & 2

Table 21

COOMPARISON GOODS SALES & IMPACTS IN 2014

Location	Forecast Sales Pre-impacts (Scenario 1)	Trade Diversion to committed developments	Post-impact Sales (Scenario 2)
	(£m)	(£m)	(£m)
Northampton Town Centre	353.03	0.80	353.83
Kingsthorpe District Centre	17.70		17.70
Weston Favell District Centre	60.58	1.50	59.08
Out-of-centre Retail Parks & superstores	407.68	0.75	406.93
Elsewhere	n/a	0.42	n/a

Source: Previous Tables. AECOM for Trade Draws.

Scenario 3

Table 22

COOMPARISON GOODS SALES & IMPACTS IN 2014

Location	Forecast Sales Pre-impacts (Scenario 1)	Post Impact Sales in Scenario 2	Trade Draw to Sainsburys extension		Trade Diverted	Impact on Scenario 2 Sales	Cumulative Impact
	(£m)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Northampton Town Centre	353.03	353.83	50.00	6.39	6.39	-1.8%	-1.6%
Kingsthorpe District Centre	17.70	17.70	2.50	0.32	0.32	-1.8%	-1.8%
Weston Favell District Centre	60.58	59.08	2.50	0.32	0.32	-0.5%	-3.0%
Out-of-centre Retail Parks & superstores	407.68	406.93	35.00	4.47	4.47	-1.1%	-1.3%
Elsewhere	n/a	n/a	10.00	1.28	1.28	n/a	n/a
Proposed Sainsburys Extension			100.00	12.77	12.77		

Source: Previous Tables. AECOM for Trade Draws.

Scenario 4

Table 23

COOMPARISON GOODS SALES & IMPACTS IN 2014

Location	Forecast Sales Pre-impacts (Scenario 1)	Post Impact Sales in Scenario 3	Trade Draw to Nene Valley Retail Park superstore		Trade Diverted	Impact on Scenario 3 Sales	Cumulative Impact
	(£m)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Northampton Town Centre	353.03	347.45	55.00	5.00	5.00	-1.4%	-3.0%
Kingsthorpe District Centre	17.70	17.38	2.50	0.23	0.23	-1.3%	-3.1%
Weston Favell District Centre	60.58	58.77	3.50	0.32	0.32	-0.5%	-3.5%
Out-of-centre Retail Parks & superstores	407.68	402.46	25.00	2.27	2.27	-0.6%	-1.8%
Elsewhere	n/a	n/a	9.00	0.82	0.82	n/a	n/a
Proposed Sainsburys Extension		12.77	5.00	0.45	0.45	-3.6%	-3.6%
Proposed Nene Valley RP superstore			100.00	9.09	9.09		

Source: Previous Tables. AECOM for Trade Draws.

Notes: Impact on retail parks & superstores includes impact on the existing Sainsburys superstore

Cumulative Retail Impact Assessment - Comparison Goods

Scenario 5

Table 24
COOMPARISON GOODS SALES & IMPACTS IN 2014

Location	Forecast Sales Pre-impacts (Scenario 1)	Post Impact Sales in Scenario 4	Trade Draw to Tesco extension		Trade Diverted	Impact on Scenario 4 Sales	Cumulative Impact
	(£m)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Northampton Town Centre	353.03	342.45	50.00	6.22	6.22	-1.8%	-4.8%
Kingsthorpe District Centre	17.70	17.15	1.50	0.19	0.19	-1.1%	-4.1%
Weston Favell District Centre	60.58	58.45	5.00	0.62	0.62	-1.1%	-4.6%
Out-of-centre Retail Parks & superstores	407.68	400.18	25.00	3.11	3.11	-0.8%	-2.6%
Elsewhere	n/a	n/a	6.00	0.75	0.75	n/a	n/a
Proposed Sainsburys Extension		12.32	5.00	0.62	0.62	-5.1%	-8.4%
Proposed Nene Valley RP superstore		9.09	7.50	0.93	0.93	-10.3%	-10.3%
Proposed Tesco superstore extension			100.00	12.44	12.44		

Source: Previous Tables. AECOM for Trade Draws.

Scenario 6

Table 25
COOMPARISON GOODS SALES & IMPACTS IN 2014

Location	Forecast Sales Pre-impacts (Scenario 1)	Post Impact Sales in Scenario 5	Trade Draw to new superstore at Barrack Road		Trade Diverted	Impact on Scenario 5 Sales	Cumulative Impact
	(£m)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Northampton Town Centre	353.03	336.23	55.00	6.78	6.78	-2.0%	-6.7%
Kingsthorpe District Centre	17.70	16.96	4.00	0.49	0.49	-2.9%	-6.9%
Weston Favell District Centre	60.58	57.83	3.00	0.37	0.37	-0.6%	-5.2%
Out-of-centre Retail Parks & superstores	407.68	397.07	20.00	2.46	2.46	-0.6%	-3.2%
Elsewhere	n/a	n/a	5.00	0.62	0.62	n/a	n/a
Proposed Sainsburys Extension		11.70	5.00	0.62	0.62	-5.3%	-13.3%
Proposed Nene Valley RP superstore		8.15	5.00	0.62	0.62	-7.6%	-17.0%
Proposed Tesco superstore extension		12.44	3.00	0.37	0.37	-3.0%	-3.0%
Proposed Barrack Road superstore			100.00	12.32	12.32		

Source: Previous Tables. AECOM for Trade Draws.

Notes: Impact on retail parks & superstores includes impact on the existing Sainsburys & Tesco superstores

Cumulative Retail Impact Assessment - Comparison Goods

Scenario 7

Table 26
COOMPARISON GOODS SALES & IMPACTS IN 2014

Location	Forecast Sales Pre-impacts	Post Impact Sales in Scenario 6	Trade Draw to new Waitrose supermarket		Trade Diverted	Impact on Scenario 6 Sales	Cumulative Impact
	(£m)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Northampton Town Centre	353.03	329.45	50.00	0.96	0.96	-0.3%	-7.0%
Kingsthorpe District Centre	17.70	16.47	13.50	0.26	0.26	-1.6%	-8.4%
Weston Favell District Centre	60.58	57.46	1.00	0.02	0.02	0.0%	-5.2%
Out-of-centre Retail Parks & superstores	407.68	394.61	15.00	0.29	0.29	-0.1%	-3.3%
Elsewhere	n/a	n/a	2.50	0.05	0.05	n/a	n/a
Proposed Sainsburys Extension		11.08	1.50	0.03	0.03	-0.3%	-13.5%
Proposed Nene Valley RP superstore		7.54	5.00	0.10	0.10	-1.3%	-18.1%
Proposed Tesco superstore extension		12.07	10.00	0.19	0.19	-1.6%	-4.5%
Proposed Barrack Road superstore		12.32	1.50	0.03	0.03	-0.2%	0.2%
Proposed Waitrose supermarket			100.00	1.93	1.93		

Source: Previous Tables. AECOM for Trade Draws.

Scenario 8

Table 27
COOMPARISON GOODS SALES & IMPACTS IN 2014

Location	Forecast Sales Pre-impacts (Scenario 1)	Post Impact Sales in Scenario 2	Trade Draw to Tesco Superstore Extension		Trade Diverted	Impact on Scenario 2 Sales	Cumulative Impact
	(£m)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Northampton Town Centre	353.03	353.83	50.00	6.22	6.22	-1.8%	-1.5%
Kingsthorpe District Centre	17.70	17.70	1.50	0.19	0.19	-1.1%	-1.1%
Weston Favell District Centre	60.58	59.08	5.00	0.62	0.62	-1.1%	-3.5%
Out-of-centre Retail Parks & superstores	407.68	406.93	35.00	4.35	4.35	-1.1%	-1.3%
Elsewhere	n/a	n/a	8.50	1.06	1.06	n/a	n/a
Proposed Tesco superstore extension			100.00	12.44	12.44		

Source: Previous Tables. AECOM for Trade Draws.

Scenario 9

Table 28
COOMPARISON GOODS SALES & IMPACTS IN 2014

Location	Forecast Sales Pre-impacts	Post Impact Sales in Scenario 2	Trade Draw to Sainsburys Superstore Extension		Trade Draw to Tesco Superstore Extension		Total Trade Diverted	Impact on Scenario 2 Sales	Cumulative Impact
	(£m)	(£m)	(%)	(£m)	(%)	(£m)	(£m)	(%)	(%)
Northampton Town Centre	353.03	353.83	50.00	6.39	50.00	6.22	12.61	-3.6%	-3.3%
Kingsthorpe District Centre	17.70	17.70	2.50	0.32	1.50	0.19	0.51	-2.9%	-2.9%
Weston Favell District Centre	60.58	59.08	2.50	0.32	5.00	0.62	0.94	-1.6%	-4.0%
Out-of-centre Retail Parks & superstores	407.68	406.93	35.00	4.47	35.00	4.35	8.83	-2.2%	-2.3%
Elsewhere	n/a	n/a	10.00	1.28	8.50	1.06	2.33	n/a	n/a
Proposed Sainsburys Extension			100.00	12.77	100.00				
Proposed Tesco superstore extension						12.44			

Source: Previous Tables. AECOM for Trade Draws.

Cumulative Retail Impact Assessment - Comparison Goods

Summary

Scenarios 1 to 9

Table 29

COMPARISON GOODS SALES & IMPACTS IN 2014

Store / Centre	Forecast Sales Pre-Impacts (Scenarios 1)	Impacts Scenario 2	Cumulative Impacts Scenario 3	Cumulative Impacts Scenario 4	Cumulative Impacts Scenario 5	Cumulative Impacts Scenario 6	Cumulative Impacts Scenario 7	Cumulative Impacts Scenario 8	Cumulative Impacts Scenario 9	Scenario 2 comparison with 2010 sales	Scenario 7 comparison with 2010 sales	Scenario 9 comparison with 2010 sales
	(£m)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
Northampton Town Centre	353.03	0.2%	-1.6%	-3.0%	-4.8%	-6.7%	-7.0%	-1.5%	-3.3%	114%	106%	110%
Kingsthorpe District Centre	17.70	0.0%	-1.8%	-3.1%	-4.1%	-6.9%	-8.4%	-1.1%	-2.9%	114%	104%	111%
Weston Favell District Centre	60.58	-2.5%	-3.0%	-3.5%	-4.6%	-5.2%	-5.2%	-3.5%	-4.0%	112%	109%	110%
Out-of-centre Retail Parks & superstores	407.68	-0.2%	-1.3%	-1.8%	-2.6%	-3.2%	-3.3%	-1.3%	-2.3%	114%	111%	112%
Elsewhere	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Proposed Sainsburys Extension				-3.6%	-8.4%	-13.3%	-13.5%					
Proposed Nene Valley RP superstore					-10.3%	-17.0%	-18.1%					
Proposed Tesco superstore extension						-3.0%	-4.5%					
Proposed Barrack Road superstore							0.2%					
Proposed Waitrose supermarket												

Source:

Previous Tables

Notes:

Negative impacts indicate reduction in sales. Positive impacts indicate increase in sales.

The Scenarios 7 & 9 comparison with 2010 sales indicates the degree to which the sales after the cumulative impacts of Scenarios 7 & 9 would be above or below estimated 2010 levels