Northumberland County Council

Northumberland Town Centre and Retail Study Addendum – Needs Arising from Garden Village Proposal

Draft Report

October 2016

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1.0 Introduction

Instruction

1.01 WYG Planning (hereafter referred to as 'WYG') was commissioned by Northumberland County Council ('the Council') in October 2016 to undertake an appraisal of the scale of provision which may be required to serve the retail needs of a Garden Village which is proposed at the Dissington Estate, to the north west of Ponteland. We understand that the proposal is the subject of an Expression of Interest which has been submitted to the Government for consideration as part of its Locally-Led Garden Villages, Towns and Cities programme.

1.02 This report seeks to provide an Addendum to the Northumberland Town Centre and Retail Study Update ('the Retail Study') which was published earlier this year. The purpose of the Addendum is to identify the potential future needs arising from the Garden Village proposal to ensure that appropriate retail facilities are provided as part of the development. It is understood that the housing and population growth arising from the Garden Village is in addition to that which is otherwise being planned for in Northumberland. In this context, the Addendum does not seek to review all of the findings of the Retail Study, but, instead, should be read in conjunction with it.

1.03 At the outset it should be emphasised that the assessment which follows seeks to provide an indicative assessment of the type of retail facilities which could be supported at the Garden Village, but the analysis has been undertaken in the absence of a detailed proposal. Accordingly, it may be the case that the Garden Village could, in practice, appropriately retain a greater level of expenditure than that which has been assumed in this assessment. Such a scenario may not be problematic as it would mean that residents were able to source and purchase a greater number of goods locally without travelling further afield.

1.04 It should also be noted that this Addendum report provides a quantitative need assessment; it should not be inferred that any additional retail floorspace provided at the Garden Village in practice (beyond that identified in this report) would result in any unacceptable impact at any other centre. The assessment of retail impact is a separate exercise which falls outside the scope of this commission. However, it should be noted that a range of centres, including Ponteland town centre and Newcastle city centre, are likely to attract expenditure from the Garden Village, which could have some beneficial impact on their vitality and viability (albeit this would likely be marginal in the case of Newcastle city centre, given its scale).

Structure of Report

1.05 This Addendum briefly summarises the context for the development of the Garden Village, before considering its population, the likely level of convenience and comparison goods expenditure it would support, and its associated future needs.

1.06 Our report is structured as follows:

- Section 2 sets out the relevant policy context and summarises the findings of the Retail Study insofar as they are relevant to the provision of additional facilities to support the Garden Village;
- Section 3 provides our estimation of the population and expenditure which will arise from the development of the Garden Village;
- Section 4 considers the requirements for new facilities and, in particular, retail floorspace; and
- Section 5 provides our conclusions and recommendations.

2.0 Context for the Delivery of the Garden Village

2.01 In examining the relevant context to the delivery of the Garden Village, we consider there to be four matters which merit particular consideration. These are as follows:

- national planning policy and the requirement for all identified needs to be met in full;
- the type of provision which would need to be provided to constitute a requirement for the designation of a new local or district centre;
- the Locally-Led Garden Villages, Towns and Cities programme and the relevant eligibility criteria; and
- the relevant findings of the Retail Study.

2.02 Each of these is considered in turn below.

The National Planning Policy Framework

2.03 The Framework was published on 27 March 2012 and replaced all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars with a single consolidated document.

2.04 The main theme of the Framework is that there should be 'a presumption in favour of sustainable development', with paragraph 7 of the Framework indicating that sustainable development will have three dimensions: economic, social and environmental.

2.05 Paragraph 7 goes on to state that:

'These dimensions give rise to the planning system to perform a number of roles:

- **an economic role – contributing to building a strong, responsive and competitive economy, by ensuring that sufficient land of the right type is available in the right places and at the right time to support growth and innovation; and by identifying and coordinating development requirements, including the provision of infrastructure;**

- **a social role – supporting strong, vibrant and healthy communities, by providing the supply of housing required to meet the needs of present and future generations; and by creating a high quality built environment, with accessible local services that reflect the community's needs and support its health, social and cultural well-being; and**

- **an environmental role – contributing to protecting and enhancing our natural, built and historic environment; and, as part of this, helping to improve biodiversity, use natural resources prudently, minimise waste and pollution, and mitigate and adapt to climate change including moving to a low carbon economy.'**

2.06 Paragraph 8 of the Framework indicates that economic, social and environmental gains should be sought jointly to secure sustainable development and that the planning system should play an active role in securing solutions.

2.07 Paragraph 14 indicates that, in progressing development plans, local planning authorities should positively seek opportunities to meet the development needs of their area and that development plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change.

2.08 Paragraph 17 provides a set of 12 core land-use principles which should underpin both plan-making and decision-taking. The identified principles which have greatest relevance to this study comprise the need to:

- Proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and meet housing, business and other development needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of the residential and business communities;
- Actively manage patterns of growth to make the fullest possible use of public transport, walking and cycling, and focus significant development in locations which are or can be made sustainable; and
- Take account of and support strategies to improve health, social and cultural wellbeing for all, and deliver sufficient community and cultural facilities and services to meet local needs.

2.09 Paragraph 23 seeks to promote positive and competitive centres. In drawing up development plans, local planning authorities should, *inter alia*, allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability.

Definition of District and Local Centres

2.10 The NPPF fails to provide any specific definition of what will constitute either a 'district' or a 'local' centre and due to this 'policy vacuum' (which we consider to likely be an oversight, rather than any purposeful attempt to remove established designations), it is therefore appropriate to refer to the most recent guidance which does provide such clarification. Accordingly, we set out below the full definition of local and district centres provided by (the now superseded) Planning Policy Statement 4: Planning for Sustainable Economic Growth ('PPS4') below.

'District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.'

'Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.'

2.11 PPS4 also clarified that small parades of shops of purely neighbourhood significance should not be regarded as defined centres.

2.12 It is evident from the definitions that differentiation between the above two types of centre – and between designated centres and smaller aggregations of shops and services – will be made with reference to the provision of: food shopping; libraries; post offices; pharmacies; and, banks and building societies. With regard to the latter of these key attractors, we note that in recent times it has become increasingly common for smaller centres to be served by an ATM rather than by a bank and we would suggest that commercial considerations (and the site's relative proximity to Ponteland town centre) will ensure that this would likely be the case in respect of the Garden Village proposal.

National Context for the Establishment of the Garden Village

2.13 The Locally-Led Garden Villages, Towns and Cities prospectus (Department for Communities and Local Government, March 2016) affirms the Government's commitment to appropriate new settlements and indicates that this support extends to local areas which want to create garden communities on a smaller scale.

2.14 Paragraph 8 of the prospectus invites expressions of interest by 31 July 2016 for new Garden Villages providing between 1,500 and 10,000 homes. It indicates that the Government's intention is to support 12 new Garden Village proposals.

2.15 In terms of the type of development the Government is seeking to provide for, paragraph 11 of the prospectus identifies that:

'...we will support local areas that embed key garden city principles to develop communities that stand out from the ordinary. We do not want to impose a set of development principles on local areas, and will support local areas in developing their own vision for their communities. But, we will want to see evidence of attractive, well-designed places with local support.'

2.16 Paragraphs 12 to 29 of the prospectus consider 'eligibility criteria' and 'prioritisation criteria' which the Government will give consideration to in determining which expressions of interest to support.

2.17 The eligibility criteria indicate that Garden Villages must:

- relate to proposal for a new settlement of 1,500 to 10,000 homes;
- be a new, discrete settlement; and
- be led by local authorities.

2.18 The prioritisation criteria set out a requirement (at paragraph 19 of the prospectus) that Garden Villages should **'...create sustainable places where people want to live and be part of the local community.'**

Summarised Findings of the Northumberland Town Centre and Retail Study

2.19 The future requirement for additional retail floorspace across the Northumberland County administrative area and within Ponteland was considered by the Retail Study. The identified requirement for additional retail floorspace at 2031 is considered to be of greatest relevance, given that we understand that the Garden Village would be delivered between 2019 and 2031[1].

[1] In accordance with the email instruction provided to WYG by Jonathan Nicholson of Northumberland County Council on 5 October 2016

2.20 The below Tables 2.1 and 2.2 summarise the identified need for additional convenience goods floorspace both for the County and for Ponteland in the period to 2031. Based on the retention of settlements' existing market share and taking into consideration extant planning commitments, the Retail Study concluded that there would only be an additional need for convenience goods floorspace across Northumberland as a whole from 2021 onwards. At 2021, the identified expenditure surplus equates to a minimum requirement of 500 sq.m of floorspace, increasing to a minimum requirement of 5,400 sq.m at 2031.

Table 2.1: Quantitative Need for Additional Convenience Goods Floorspace in Northumberland

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2015	-4.1	26.8	-30.8	-2,400	-6,200
2016	2.5	26.7	-24.2	-1,900	-4,900
2021	32.7	26.4	6.3	500	1,300
2026	65.0	26.5	38.5	3,000	7,800
2031	97.0	26.7	70.3	5,400	14,100

Source: Derived from Table 7.5 of the Northumberland Town Centre and Retail Study Update of March 2016
[1] Average sales density assumed to be £13,018 per sq.m at 2015 (based on the average sales density of the leading four supermarket operators as identified by Verdict 2014)
[2] Average sales density assumed to be £5,000 per sq.m at 2015
In 2013 prices

2.21 In Ponteland, the turnover of the existing convenience goods provision is slightly less than we would anticipate with reference to the 'benchmark' turnover of existing convenience goods retailers. As a consequence, the Retail Study did not identify any further requirement for additional convenience goods floorspace in Ponteland town centre across the whole of the reporting period to 2031.

Table 2.2: Quantitative Need for Additional Convenience Goods Floorspace in Ponteland

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2015	-3.0	0.0	-3.0	-200	-600
2016	-2.8	0.0	-2.8	-200	-600
2021	-1.9	0.0	-1.9	-100	-400
2026	-1.0	0.0	-1.0	-100	-200
2031	-0.1	0.0	-0.1	0	0

Source: Derived from Table 7.50 of the Northumberland Town Centre and Retail Study Update of March 2016
[1] Average sales density assumed to be £13,018 per sq.m at 2015 (based on the average sales density of the leading four supermarket operators as identified by Verdict 2014)
[2] Average sales density assumed to be £5,000 per sq.m at 2015
In 2013 prices

2.22 Turning to comparison goods, as a consequence of extant planning permissions, there is no identified requirement for additional floorspace across the County until 2026. The below Table 2.3 indicates that, based on the retention of settlements' existing market share and taking into consideration extant planning commitments, there is a minimum requirement in Northumberland for 8,900 sq.m of convenience goods floorspace at 2026, increasing to a minimum requirement for 20,000 sq.m at 2031.

Table 2.3: Quantitative Need for Additional Comparison Goods Floorspace in Northumberland

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2015	0.0	35.8	-35.8	-7,200	-11,900
2016	2.5	36.6	-34.1	-6,700	-11,100
2021	34.4	40.4	-6.0	-1,100	-1,800
2026	100.8	45.1	55.8	8,900	14,800
2031	190.6	50.3	140.3	20,000	33,300

Source: Derived from Table 7.6 of the Northumberland Town Centre and Retail Study Update of March 2016
[1] Average sales density assumed to be £5,000 per sq.m at 2015
[2] Average sales density assumed to be £3,000 per sq.m at 2015
In 2013 prices

2.23 Ponteland has a modest comparison goods function and, as a consequence, the Retail Study identified only a very limited requirement for additional comparison goods floorspace within the town centre in the period to 2031. Indeed, as Table 2.4 below demonstrates, the minimum comparison goods floorspace requirement at 2021 identified by the Retail Study is 100 sq.m, increasing to a minimum requirement for 300 sq.m at 2031.

Table 2.4: Quantitative Need for Additional Comparison Goods Floorspace in Ponteland

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	0.0	0.0	0.0	0	0
2016	0.0	0.0	0.0	0	0
2021	0.3	0.0	0.3	100	100
2026	0.9	0.0	0.9	100	200
2031	1.6	0.0	1.6	200	400

Source: Derived from Table 7.51 of the Northumberland Town Centre and Retail Study Update of March 2016
[1] Average sales density assumed to be £5,000 per sq.m at 2015
[2] Average sales density assumed to be £3,000 per sq.m at 2015
In 2013 prices

2.24 Given the location of the proposed Garden Village, we consider that the development would only materially alter the findings of the Retail Study in respect of the overall Northumberland-wide need for additional retail floorspace and the need which arises at Ponteland town centre. Accordingly, we will revisit the above findings later in this report having given consideration to the additional needs arising from residents of the Garden Village.

3.0 Population and Expenditure Generated by Proposed Garden Village

Population

3.01 We are informed by the Council that three potential levels of housing delivery at 2031 are under consideration. We outline these three scenarios below at Table 3.1. We understand that the delivery would likely occur at a consistent rate from around 2019 and this report therefore assumes that the below growth is split proportionately across the 12 year period between 2019 and 2031. By 2031, the Council anticipates that the population of the Garden Village will be between 3,044 persons and 5,057 persons.

Table 3.1: Proposed Housing and Population Associated with Garden Village Proposal at 2031

	Scenario 1	Scenario 2	Scenario 3
Dwellings	1,200	1,870	2,000
Population	3,044	4,721	5,057

Source: Email from Jonathan Nicholson of the Council to WYG of 5 October 2016

3.02 On this basis, we provide the estimated population growth under each of the three scenarios for the reporting years utilised by the Retail Study below at Table 3.2.

Table 3.2: Proposed Housing and Population Associated with Garden Village Proposal at 2031

Year	Scenario 1 Population	Scenario 2 Population	Scenario 3 Population
2019	254	393	421
2021	761	1,180	1,264
2026	1,776	2,754	2,950
2031	3,044	4,721	5,057

Convenience and Comparison Goods Expenditure

3.03 The Garden Village proposal sits within Zone 7 of the Study Area utilised by the Retail Study. As a consequence, we have assumed that the socio-economic character of the Garden Village will likely be similar to that of the zone within which it sits. In order to be consistent in our approach, we derive per capita expenditure estimates for Zone 7 directly from the Retail Study. However, we briefly clarify our approach in generating expenditure estimates below.

3.04 The Retail Study sources Zone 7 per capita expenditure at 2013 from Experian Micromarketer G3 data. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity.

3.05 The base year for the Experian expenditure data is 2013 (a 2013 price base is used for all monetary values in this Addendum report). Per capita annual retail expenditure growth forecasts have been derived from Experian Retail Planner Briefing Note 12.1 ('ERPBN'). Appendix 3 of ERPBN 12.1 identifies annual growth forecasts for convenience and comparison goods which we set out below in Table 3.3 and which inform our assessment.

Table 3.3: Experian Annual Expenditure Growth Rate Forecasts

Year	Convenience	Comparison
2014	-0.5%	5.7%
2015	0.5%	4.4%
2016	0.4%	3.1%
2017	0.5%	3.0%
2018	0.4%	3.0%
2019	0.7%	3.2%
2020	0.7%	3.2%
2021	0.5%	3.0%
2022	0.8%	3.3%
2023	0.8%	3.3%
2024	0.8%	3.3%
2025	0.7%	3.3%
2026	0.7%	3.2%
2027	0.6%	3.2%
2028	0.8%	3.3%
2029	0.6%	3.3%
2030	0.6%	3.3%
2031	0.7%	3.4%

Source: Appendix 3, Retail Planner Briefing Note 12.1 (October 2014).

3.06 The growth forecasts confirm that the recovery from the downturn in the economy is well underway, albeit growth in convenience goods expenditure will improve over the medium and long term when compared to the current position. For convenience goods, ERPBN 12.1 forecasts a -0.5% decrease in per capita expenditure at 2014, followed by consistent growth which reaches +0.8% at 2022. Whilst there is some deviation in the rate forecast thereafter, the rate of annual convenience goods growth forecast to 2031 does not fall below +0.6%.

3.07 By contrast, ERPBN 12.1 identifies an immediate and relatively strong annual comparison growth rate of +5.7% at 2014. A drop in the rate of growth to +4.4% at 2015 and then to +3.1% at 2016 is anticipated, with growth rates thereafter to 2030 forecast to be extremely stable, within the range +3.0% to +3.3%.

3.08 Experian Retail Planner Briefing Note 12.1 also provides forecasts in respect of the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the period to 2031. Accordingly, an allowance can be made to account for expenditure which is committed through special forms of trading to ensure that the trade which is available to support shops is not overstated.

3.09 However, in considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations. As a consequence, the discount we apply equates to Experian's 'adjusted' figure (provided at Appendix 3 of ERPBN 12.1) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading identified below at Table 6.3 is excluded from our retail expenditure in order to ascertain the level of expenditure which is actually available to support shopping facilities 'on the ground' at 2031.

Table 3.4: Special Forms of Trading Forecasts

Year	Convenience	Comparison
2031	5.6%	15.5%

Source: Appendix 3, Experian Retail Planner Briefing Note 12.1 (October 2014)

3.10 Using the above growth rates, allowances for special forms of trading and population estimates, the below Table 3.5 provides an estimate of the convenience goods expenditure which will be generated by residents of the Garden Village at 2031. We have disaggregated the identified expenditure in terms of the assumed expenditure which will be committed through 'main food' shopping trips and that which will be committed through 'top up' food shopping in accordance with the findings of the household survey which informed the Retail Study. The survey suggests that 73.3% of convenience goods expenditure throughout Retail Study Zone 7 is committed through main food shopping trips, and 26.7% through 'top up' shopping trips.

3.11 Table 3.5 indicates that growth Scenarios 1, 2 and 3 result in respective estimated convenience goods expenditure of £7.1m, £11.0m and £11.7m.

Table 3.5: Estimated Available Convenience Goods Expenditure in the Garden Village at 2031

Scenario	Population at 2031	Per Capita Convenience Expenditure at 2013 (£)[1]	Per Capita Convenience Expenditure at 2013 without SFT (£)	Per Capita Convenience Expenditure at 2031 without SFT (£)[2]	Estimated Available Convenience Goods Expenditure at 2031 (£m)	Estimated Available 'Main Food' Convenience Expenditure at 2031 (£m)	Estimated Available 'Top Up' Convenience Expenditure at 2031 (£m)
Scenario 1	3,044	2,217	2,166	2,320	7.1	5.2	1.9
Scenario 2	4,721	2,217	2,166	2,320	11.0	8.0	2.9
Scenario 3	5,057	2,217	2,166	2,320	11.7	8.6	3.1

[1] Per capita convenience goods expenditure sourced from Experian MMG3 data report utilised in the Retail Study
[2] Expenditure growth and allowance for special forms of trading sourced from Appendix 3 of ERPBN 12.1
In 2013 prices

3.12 Table 3.6 summarises the same exercise in respect of comparison goods expenditure (which we provide as a single estimate). The table indicates that growth Scenarios 1, 2 and 3 result in respective estimated comparison goods expenditure arising from the Garden Village of £19.3m, £29.9m and £32.1m.

Table 3.6: Estimated Available Comparison Goods Expenditure in the Garden Village at 2031

Scenario	Population at 2031	Per Capita Convenience Expenditure at 2013 (£)[1]	Per Capita Convenience Expenditure at 2013 without SFT (£)	Per Capita Convenience Expenditure at 2031 without SFT (£)[2]	Estimated Available Convenience Goods Expenditure at 2031 (£m)
Scenario 1	3,044	4,101	3,646	6,338	19.3
Scenario 2	4,721	4,101	3,646	6,338	29.9
Scenario 3	5,057	4,101	3,646	6,338	32.1

[1] Per capita convenience goods expenditure sourced from Experian MMG3 data report utilised in the Retail Study
[2] Expenditure growth and allowance for special forms of trading sourced from Appendix 3 of ERPBN 12.1
In 2013 prices

4.0 Need for Additional Facilities

Proportion of Retail Expenditure Claimed by Garden Village Facilities

4.01 Given the scale of the proposed Garden Village (relative to other settlements), it is inevitable that a significant proportion of the identified estimated expenditure within the settlement will be spent elsewhere. Accordingly, it is necessary to consider what proportion of the expenditure which would originate within the Garden Village would be retained within it. In this regard, we have reviewed existing shopping patterns within Retail Study Zone 7 (as identified by the Retail Study household survey) and have also given consideration to the particular characteristics of the Garden Village (including its location), and the aspirations of the NPPF and the Locally-Led Garden Villages, Towns and Cities prospectus to create sustainable settlements. In reviewing Zone 7 shopping patterns, it is important to recognise that the zone covers a relatively large area and that it is likely that Garden Village residents are likely to exhibit different patterns of behaviour to those that are apparent across the zone as a whole. Notwithstanding this, the survey is a helpful starting point when considering Garden Village residents' shopping patterns.

4.02 Accordingly, we summarise below the shopping patterns evident within Retail Study Zone 7 (for both convenience and comparison goods) before considering the likely future shopping habits of residents of the Garden Village. We then use this analysis to provide an estimate of the retail floorspace which could be supported by the proposal.

Convenience Goods

4.03 As summarised by Table 4.1 below, the household survey indicates that just less than one third of main food expenditure which originates within Zone 7 is retained within the zone. This is reflective of the relatively limited foodstore offer within the zone and is also a consequence of the strength of offer in nearby locations (including the Asda at Newcastle Shopping Park and the Tesco Extra at Kingston Park Centre). Accordingly, it is evident that Zone 7 shoppers generally travel outside the zone to meet main food shopping needs.

4.04 By way of contrast, almost six out of every ten pounds spent on 'top up' shopping which is generated within Zone 7 remains within the zone. This is unsurprising as shoppers tend to undertake such shopping in convenient locations which are close to home.

Table 4.1: Convenience Shopping Zone 7 Market Shares

Destination	Main Food Expenditure	Top-Up Food Expenditure
Zone 7		
Ponteland	20.8%	39.7%
Other Zone 7, Inside Northumberland County Area	0.0%	3.1%
Other Zone 7, Outside Northumberland County Area	11.6%	14.2%
Zone 9		
Hexham	3.9%	1.1%
Other Zone 9, Inside Northumberland County Area	0.0%	1.3%
Zone 11		
Cramlington	1.9%	1.3%
Outside Study Area		
Durham County Council	0.8%	0.0%
Gateshead Metropolitan Borough Council	5.9%	2.3%
Newcastle City Council	50.8%	27.8%
North Tyneside Council	4.4%	9.4%
Total	**100.0%**	**100.0%**

Source: Market shares derived from Table 3 of Appendix 4 of Northumberland Town Centre and Retail Study Update

4.05 We have given consideration to existing shopping patterns and the general type of facilities which would be expected within a Garden Village settlement which seeks to provide for some degree of self-sufficiency. We believe that a settlement of circa 3,000 to 5,000 persons would be able to support a convenience grocery store which would meet most 'top up' food shopping needs most of the time. Accordingly, in considering future shopping patterns, we have assumed that all such 'top up' convenience goods expenditure which originates within the Garden Village can be retained there (we accept that, in actuality, a small amount of 'top up' expenditure would likely 'leak' from the settlement, but believe that this will be counterbalanced by inflow from beyond the Garden Village).

4.06 In terms of main food shopping expenditure, we do not expect that the Garden Village would likely accommodate a very large food supermarket or a food superstore. However, if the Garden Village provided additional food retailers (such as a butcher, baker and similar), we believe that there is potential for it to retain a limited proportion of the main food shopping expenditure which originates within the settlement. Accordingly, we assume that around 15% of total main food expenditure originating within the Garden Village could be retained there. We assume that 20% will be claimed by Ponteland, but that no other settlement within Northumberland will benefit from any material food shopping expenditure generated in the Garden Village. Instead, we believe that residents will typically source food goods that can't be sourced very locally from larger foodstores and centres beyond the Northumberland administrative boundary.

4.07 On this basis, we set out our assumed convenience goods shopping pattern of the Garden Village's residents below at Tables 4.2 and 4.3. We have multiplied the assumed market share with the available 'top up' and main food shopping expenditure at 2031 in order to calculate the convenience goods expenditure which could be claimed by the Garden Village.

4.08 Tables 4.2 and 4.3 set out our estimate that the Garden Village could secure a total of around £2.7m of convenience goods expenditure under Scenario 1 at 2031 (comprised of £0.8m main food expenditure and £1.9m 'top up' expenditure), increasing to around £4.1m under Scenario 2, and increasing further to £4.4m under Scenario 3.

Table 4.2: Main Food Shopping Garden Village Market Shares and Expenditure at 2031

Destination	Market Share	Scenario 1 (£m)	Scenario 2 (£m)	Scenario 3 (£m)
Zone 7				
Garden Village	15.0%	0.8	1.2	1.3
Ponteland	20.0%	1.0	1.6	1.7
Other Zone 7, Outside Northumberland County Area	10.0%	0.5	0.8	0.9
Outside Study Area				
Gateshead Metropolitan Borough Council	5.0%	0.3	0.4	0.4
Newcastle City Council	50.0%	2.6	4.0	4.3
Total	**100.0%**	**5.2**	**8.0**	**8.6**

Note: Assumed WYG market share multiplied by identified main food expenditure (provided at Table 3.5 of this Addendum report) to generate expenditure estimate under each of the three scenarios

Table 4.3: 'Top Up' Food Shopping Garden Village Market Shares and Expenditure at 2031

Destination	Market Share	Scenario 1 (£m)	Scenario 2 (£m)	Scenario 3 (£m)
Zone 7				
Garden Village	100.0%	1.9	2.9	3.1
Ponteland	0.0%	0.0	0.0	0.0
Other Zone 7, Outside Northumberland County Area	0.0%	0.0	0.0	0.0
Outside Study Area				
Gateshead Metropolitan Borough Council	0.0%	0.0	0.0	0.0
Newcastle City Council	0.0%	0.0	0.0	0.0
Total	**100.0%**	**0.8**	**1.2**	**1.3**

Note: Assumed WYG market share multiplied by identified 'top up' food expenditure (provided at Table 3.5 of this Addendum report) to generate expenditure estimate under each of the three scenarios

Comparison Goods

4.09 Turning to comparison goods, the below Table 4.3 indicates that the majority of comparison goods expenditure which originates within Zone 7 is spent outside of the zone (and, indeed, outside of the

Northumberland administrative area). Retail venues in Newcastle City Council administrative area claim nearly six out of every ten pounds of comparison goods expenditure generated from within Zone 6, which is not unexpected given the Newcastle's proximity and strong shopping offer. Significant expenditure is also claimed by Gateshead (which is principally as a consequence of it accommodating the Metrocentre). The survey indicates that 4.2% of Zone 7 comparison goods expenditure is claimed by Ponteland.

Table 4.4: Convenience Shopping Zone 7 Market Shares

Destination	Main Food Expenditure
Zone 3	
Scots Gap	0.4%
Zone 7	
Ponteland	4.2%
Other Zone 7, Inside Northumberland County Area	0.6%
Other Zone 7, Outside Northumberland County Area	0.9%
Zone 8	
Prudhoe	0.3%
Other Zone 7, Inside Northumberland County Area	0.3%
Zone 9	
Hexham	2.8%
Other Zone 9, Inside Northumberland County Area	0.4%
Zone 11	
Cramlington	1.5%
Zone 13	
Morpeth	0.3%
Zone 14	
Ashington	0.0%
Outside Study Area	
Gateshead Metropolitan Borough Council	21.9%
Newcastle City Council	59.0%
North Tyneside Council	5.5%
Other	1.8%
Total	**100.0%**

Source: Market shares derived from Table 30 of Appendix 5 of Northumberland Town Centre and Retail Study Update

4.10 In considering likely Garden Village comparison goods shopping patterns, we have once more reviewed existing shopping patterns and the general type of facilities which we would expect to be located within a Garden Village settlement. We believe that a settlement of circa 3,000 to 5,000 persons would only likely to be able to support a limited comparison goods offer, which would focus around the type of goods for which shoppers may only visit one shop to source (in our view, this type of comparison goods retailer includes pharmacies, florists, card shops and similar).

4.11 Accordingly, in considering future shopping patterns, we have assumed that only 5% of all Garden Village comparison goods expenditure will be retained within the settlement and that a further 5% will be claimed by Ponteland. We do not believe that any material level of expenditure will be claimed by any other centre in Northumberland. A very significant proportion of comparison goods expenditure would likely be claimed by Newcastle city centre and the Metrocentre due to their very strong offer and relatively proximate location.

4.12 We set out our assumed pattern of comparison goods shopping for Garden Village residents below at Table 4.5. We have multiplied the assumed market share with the comparison goods expenditure arising from the settlement in order to calculate the comaprison goods expenditure which could be claimed by the Garden Village. Accordingly, Table 4.5 sets out our estimate that the Garden Village could secure around £1.0m of convenience goods expenditure under Scenario 1 at 2031, increasing to around £1.5m under Scenario 2, and increasing slightly again to £1.6m under Scenario 3.

Table 4.5: Comparison Goods Garden Village Market Shares and Expenditure at 2031

Destination	Market Share	Scenario 1 (£m)	Scenario 2 (£m)	Scenario 3 (£m)
Zone 7				
Garden Village	5.0%	1.0	1.5	1.6
Ponteland	5.0%	1.0	1.5	1.6
Other Zone 7, Outside Northumberland County Area	1.0%	0.2	0.3	0.3
Outside Study Area				
Gateshead Metropolitan Borough Council	20.0%	3.9	6.0	6.4
Newcastle City Council	60.0%	11.6	18.0	19.2
North Tyneside Council	5.0%	1.0	1.5	1.6
Other	4.0%	0.8	1.2	1.3
Total	**100.0%**	**19.3**	**29.9**	**32.1**

Note: Assumed WYG market share multiplied by identified main food expenditure (provided at Table 3.5 of this Addendum report) to generate expenditure estimate under each of the three scenarios

Retail Floorspace Requirement

4.13 The estimated expenditure which could be claimed by Garden Village retail facilities can be converted to a floorspace requirement in order to provide an indication of the need which should be planned for. The floorspace requirement will vary dependent on the type of retailer proposed and the type of goods traded. For example, the 'main four' foodstore operators[2] have traditionally achieved higher sales densities than most other food retailers. In the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers tending to have a much higher sales density than those selling DIY or furniture goods. Accordingly, it is important to take account of the type of retailers which would likely take floorspace at the Garden Village (and elsewhere) when considering the floorspace requirement.

Convenience Goods

4.14 In respect of convenience goods, the Retail Study converted the identified expenditure surplus into floorspace requirements based on occupation by either a 'main four' operator or by a discount operator. This is on the basis that substantial additional needs tend to be met by new large foodstores.

4.15 However, the position at the Garden Village is somewhat different as no provision currently exists and that which will likely come forward is likely to be relatively modest in scale. In order to provide for a sustainable development, we consider that it is prudent to first plan for a general convenience grocery store and to then consider the level of additional floorspace which could be supported. We envisage that such additional floorspace could be occupied by a range of speciality food operators (such as a butcher, baker and so on).

4.16 Accordingly, in converting the assumed convenience goods expenditure claimed by the Garden Village into a floorspace requirement, we have assumed that:

- the first 250 sq.m of convenience goods floorspace will be occupied by a convenience grocery store; and that
- additional floorspace beyond that will take the form of more specialist food retailers.

4.17 We have assumed that the convenience grocery store could be occupied by either one of the 'main four' or by a more specialist convenience store operator (such as Co-op, Costcutter, Londis or Spar). Accordingly, we apply a sales density of £10,009 per sq.m at 2015 which is the mid-point between the 'main four' average sales density (which the Retail Study estimated to be £13,018 per sq.m at 2015) and that which we believe would likely be secured by a more specialist convenience store operator

[2] Asda, Morrisons, Sainsbury's and Tesco

(which we have assumed to be £7,000 per sq.m at 2015). In our experience, smaller specialist food retailers tend to have significantly more modest sales densities, and we have assumed that the additional floorspace at the Garden Village (above and beyond that provided for by a convenience grocery store) would trade at a sales density equivalent to £3,000 per sq.m at 2015. The approach used in converting a monetary figure to a floorspace requirement at the Garden Village differs from that utilised in the Retail Study due to the nature of the proposal.

4.18 However, the methodology we apply in converting the convenience goods expenditure which arises at Ponteland is consistent with the approach deployed in Retail Study in that we have assumed that the maximum sales density achieved will be an average of the 'main four' operators and that the minimum floorspace will be based on the figure of £5,000 per sq.m at 2015, which is considered to be representative of the lower end of the range secured by national operators.

4.19 On this basis, the below Table 4.6 provides a floorspace requirement for the Garden Village, Table 4.7 provides an additional floorspace requirement for Ponteland, and Table 4.8 sums the two sets of figures together to provide an additional floorspace requirement for Northumberland.

4.20 Table 4.6 suggests that each of the three scenarios can support a convenience grocery store at the Garden Village, but that the additional convenience goods floorspace requirement at 2031 differs substantially under each scenario. However, the below table indicates that the proposed convenience grocery store (of 250 sq.m net sales floorspace) is only supported at 2026 under the highest population growth Scenario 3 (at which point the Garden Village convenience goods floorspace requirement is 259 sq.m). The total 2031 requirement equates to a total of 306 sq.m of net convenience goods floorspace being supported at the Garden Village under Scenario 1, increasing to 797 sq.m under Scenario 2, and then increasing further to 895 sq.m under Scenario 3.

Table 4.6: Convenience Goods Need in Garden Village at 2021, 2026 and 2031

Year	Scenario	Available Convenience Goods Expenditure (£m)	Assumed Convenience Store Turnover (£m)[1]	Surplus Beyond Convenience Store (£m)[2]	Floorspace Requirement (sq.m)
2021	Scenario 1	0.6	2.5	-1.8	64
	Scenario 2	1.0	2.5	-1.5	99
	Scenario 3	1.0	2.5	-1.4	106
2026	Scenario 1	1.5	2.5	-1.0	152
	Scenario 2	2.3	2.5	-0.1	236
	Scenario 3	2.5	2.5	0.0	259
2031	Scenario 1	2.7	2.5	0.2	306
	Scenario 2	4.1	2.5	1.6	797
	Scenario 3	4.4	2.5	1.9	895

Source: Table 5B of Appendix 1 of this Addendum
[1] Turnover of the convenience store based on net sales area of 250 sq.m and assumed sales density of £10,009 per sq.m at 2015
[2] Expenditure surplus beyond convenience store converted to floorspace requirement based on a sales density of £3,000 per sq.m at 2015
2013 Prices

4.21 Table 4.7 indicates that the additional convenience goods expenditure claimed by Ponteland equates to a requirement for between 19 sq.m and 50 sq.m of net convenience goods retail floorspace at 2021 under growth Scenario 1, increasing to a requirement for between 32 sq.m and 82 sq.m under Scenario 3. By 2031, the identified need has grown considerably, such that there is a requirement for between 80 sq.m and 208 sq.m of net convenience goods floorspace at 2031 under Scenario 1, increasing to a requirement for between 124 sq.m and 323 sq.m under Scenario 2, and increasing further to a requirement for between 133 sq.m and 346 sq.m under Scenario 3.

Table 4.7: Additional Convenience Goods Need in Ponteland at 2021, 2026 and 2031

Year	Scenario	Available Convenience Goods Expenditure (£m)	Minimum Floorspace Requirement (sq.m)[1]	Maximum Floorspace Requirement (sq.m)[2]
2021	Scenario 1	0.2	19	50
	Scenario 2	0.4	30	77
	Scenario 3	0.4	32	82
2026	Scenario 1	0.6	46	119
	Scenario 2	0.9	71	184
	Scenario 3	1.0	76	197
2031	Scenario 1	1.0	80	208
	Scenario 2	1.6	124	323
	Scenario 3	1.7	133	346

Source: Table 5C of Appendix 1 of this Addendum
[1] Minimum floorspace requirement based on a sales density of £13,018 per sq.m at 2015
[2] Maximum floorspace requirement based on a sales density of £5,000 per sq.m at 2015
2013 Prices

4.22 Adding together the floorspace requirements identified in Tables 4.6 and 4.7 provides an estimated additional convenience goods floorspace requirement for the Northumberland administrative area. Table 4.8 below indicates that the Garden Village convenience goods expenditure claimed by Northumberland equates to a requirement for an additional 83 sq.m to 113 sq.m of net convenience goods sales floorspace at 2021 under growth Scenario 1, increasing to a requirement for between 137 sq.m and 188 sq.m under Scenario 3. By 2031, there is a requirement for between 386 sq.m and 514 sq.m of convenience goods floorspace under Scenario 1, increasing to a requirement for between 921 sq.m and 1,119 sq.m under Scenario 2, and increasing further to a requirement for between 1,028 sq.m and 1,241 sq.m under Scenario 3.

Table 4.8: Additional Convenience Goods Need in Northumberland at 2021, 2026 and 2031

Year	Scenario	Available Convenience Goods Expenditure (£m)	Minimum Floorspace Requirement (sq.m)	Maximum Floorspace Requirement (sq.m)
2021	Scenario 1	0.9	83	113
	Scenario 2	1.4	128	175
	Scenario 3	1.4	137	188
2026	Scenario 1	2.1	198	271
	Scenario 2	3.3	307	420
	Scenario 3	3.5	335	456
2031	Scenario 1	3.7	386	514
	Scenario 2	5.7	921	1,119
	Scenario 3	6.1	1,028	1,241

Source: Table 5D of Appendix 1 of this Addendum
2013 Prices

Comparison Goods

4.23 Turning to comparison goods, our approach in converting identified available expenditure to a floorspace requirement for the Garden Village again departs from the general approach utilised in the Retail Study because of the nature of the proposal. Whilst our Retail Study methodology assumed that additional comparison goods floorspace would generally trade at a sales density of between £3,000 per sq.m and £5,000 per sq.m at 2015, we consider the former, lower figure to be of direct relevance to the quantum of floorspace that would be required in the Garden Village itself (due to the likely limited scale and reach of the Garden Village's retail facilities).

4.24 However, the methodology we apply in converting the comparison goods expenditure which arises at Ponteland is once more consistent with the Retail Study as we have again assumed that this floorspace (which would be located in a larger settlement which accommodates some national multiple operators) could trade at a sales density between £3,000 per sq.m and £5,000 per sq.m at 2015.

4.25 On this basis, the below Table 4.9 provides a floorspace requirement for the Garden Village, Table 4.10 provides an additional floorspace requirement for Ponteland, and Table 4.11 sums the two sets of figures together to provide an additional floorspace requirement for Northumberland.

4.26 Table 4.9 indicates that the comparison goods expenditure claimed by the Garden Village equates to a minimum requirement for 51 sq.m of net comparison goods retail floorspace at 2021 under growth Scenario 1, increasing to a requirement for 85 sq.m under Scenario 3. By 2031, there is a requirement for 229 sq.m of comparison goods floorspace under Scenario 1, increasing to a requirement for 355 sq.m under Scenario 2, and increasing further to a requirement for 380 sq.m under Scenario 3.

Table 4.9: Comparison Goods Need in Garden Village at 2021, 2026 and 2031

Year	Scenario	Available Comparison Goods Expenditure (£m)	Floorspace Requirement (sq.m)[1]
2021	Scenario 1	0.2	51
	Scenario 2	0.3	79
	Scenario 3	0.3	85
2026	Scenario 1	0.5	126
	Scenario 2	0.7	196
	Scenario 3	0.8	210
2031	Scenario 1	1.0	229
	Scenario 2	1.5	355
	Scenario 3	1.6	380

Source: Table 10A of Appendix 1 of this Addendum
[1] Expenditure converted to floorspace requirement based on a sales density of £3,000 per sq.m at 2015
2013 Prices

4.27 Table 4.10 indicates that the additional comparison goods expenditure claimed by Ponteland equates to a requirement for between 31 sq.m and 51 sq.m of net comparison goods floorspace at 2021 under growth Scenario 1, increasing to a requirement for between 51 sq.m and 85 sq.m under Scenario 3. By 2031, the identified need has grown, such that there is a requirement for between 137 sq.m and 229 sq.m of net comparison goods floorspace at 2031 under Scenario 1, increasing to a requirement for between 213 sq.m and 355 sq.m under Scenario 2, and increasing further to a requirement for between 228 sq.m and 380 sq.m under Scenario 3.

Table 4.10: Additional Comparison Goods Need in Ponteland at 2021, 2026 and 2031

Year	Scenario	Available Comparison Goods Expenditure (£m)	Minimum Floorspace Requirement (sq.m)[1]	Maximum Floorspace Requirement (sq.m)[2]
2021	Scenario 1	0.2	31	51
	Scenario 2	0.3	48	79
	Scenario 3	0.3	51	85
2026	Scenario 1	0.5	76	126
	Scenario 2	0.7	117	196
	Scenario 3	0.8	126	210
2031	Scenario 1	1.0	137	229
	Scenario 2	1.5	213	355
	Scenario 3	1.6	228	380

Source: Table 10B of Appendix 1 of this Addendum
[1] Minimum floorspace requirement based on a sales density of £5,000 per sq.m at 2015
[2] Maximum floorspace requirement based on a sales density of £3,000 per sq.m at 2015
2013 Prices

4.28 Adding together the floorspace requirements in Tables 4.9 and 4.10 provides an estimated additional comparison goods floorspace requirement for the Northumberland administrative area. Table 4.11 below indicates that the Garden Village comparison goods expenditure claimed by Northumberland equates to a requirement for an additional 82 sq.m to 102 sq.m of net comparison goods sales floorspace at 2021 under growth Scenario 1, increasing to a requirement for between 136 sq.m and 170 sq.m under Scenario 3. By 2031, there is a requirement for between 366 sq.m and 458 sq.m of comparison goods floorspace under Scenario 1, increasing to a requirement for between 568 sq.m and 710 sq.m under Scenario 2, and increasing further to a requirement for between 609 sq.m and 761 sq.m under Scenario 3.

Table 4.11: Additional Comparison Goods Need in Northumberland at 2021, 2026 and 2031

Year	Scenario	Available Convenience Goods Expenditure (£m)	Minimum Floorspace Requirement (sq.m)	Maximum Floorspace Requirement (sq.m)
2021	Scenario 1	0.3	82	102
	Scenario 2	0.5	127	159
	Scenario 3	0.6	136	170
2026	Scenario 1	1.0	202	252
	Scenario 2	1.5	313	391
	Scenario 3	1.6	335	419
2031	Scenario 1	1.9	366	458
	Scenario 2	3.0	568	710
	Scenario 3	3.2	609	761

Source: Table 10C of Appendix 1of this Addendum
2013 Prices

Other Facilities

4.29 In order to understand how the identified retail floorspace requirements for the Garden Village could be supported by additional uses, it is helpful to consider typical benchmarks in respect of the number of persons required to support viable local facilities. In this regard, we consider that the Integration of Parish Plans into the Wider Systems of Local Government report (DEFRA, July 2007) provides a realistic assessment of the number of homes which are required to support various types of facilities. The Integration of Parish Plans report is accepted as a credible source of such benchmark data by the Towards Sustainable Communities: Eco-towns Community Worksheet (Town and Country Planning Association and Department for Communities and Local Government, March 2008) which seeks to provide instruction to proponents and planners in bringing forward new developments.

4.30 For the purpose of this study, the most relevant groups of facilities considered by Table 2.1 of the Integration of Parish Plans report are GPs' surgeries, post offices, community centres, health centres and libraries. A version of the report's Table 2.1 is provided below as our Table 4.12.

Table 4.12: Facilities and the Number of Households they Serve (as Amended from Integration of Parish Plans into the Wider Systems of Local Government report)

Facility	Number of Households Required to Support Specified Facility
GP's Surgery	1,000 to 1,200
Post Office	2,000 to 4,000
Community centre	2,800 to 6,000
Health centre	3,600 to 4,800
Library	4,800 to 12,000

Source: Extracted from Integration of Parish Plans into the Wider System of Local Government report (DEFRA, July 2007)

4.31 Based on the above, we believe that Garden Village population growth Scenario 1 (which provides for the delivery of 1,200 homes at 2031) and Scenario 2 (which provides for 1,870 homes) have the potential to support a GP's surgery. In addition, growth Scenario 3 could potentially support a post office. It appears unlikely that a community centre, health centre or library would be supported under any of the growth scenarios.

4.32 In addition, it is highly likely that the retail floorspace could also be supplemented by retail services (such as hairdressers and beauticians) and leisure services (such as pubs and restaurants). Such uses are not generally considered by quantitative need assessments but, in our experience, can often account for between a quarter and a half of commercial floorspace in a local parade or Local Centre. Leisure services, in particular, also often fall within an A1 Use Class bur are not accounted for in considering convenience and comparison goods need. Accordingly, any requirement for such floorspace is in addition to the above identified convenience and comparison goods needs.

Conclusion in Respect of Garden Village Facilities

4.33 As a consequence of the above analysis, we believe that at 2031, the Garden Village could be supported by the following facilities:

- between 306 sq.m and 895 sq.m of net convenience goods floorspace, dependant on which growth scenario is pursued;
- between 229 sq.m and 380 sq.m of net comparison goods floorspace dependant on which growth scenario is pursued;
- a GP's surgery and potentially a post office; and

- additional retail service and leisure service floorspace, including food and drink operators (and which could also include further Class A1 floorspace not accounted for in our assessment of convenience and comparison goods needs, e.g. hairdressers, beauticians, dry cleaners and so on).

4.34 In considering the planning status of any such grouping of facilities, we again note that the now superseded PPS4 identified that local centres will include a range of small shops serving a local catchment. Most particularly, PPS4 indicates that local centres may include a small supermarket, newsagent, sub-post office and a pharmacy (alongside other facilities including a hot-food takeaway and launderette). We consider that the scale of requirement identified under growth Scenarios 2 and 3 is such that it could comprise a defined local centre. The level of requirement under Scenario 1 is more modest and could more closely resemble a local parade in practice.

5.0 Findings and Conclusions

5.01 In order to place our findings in context, we have revisited the relevant tables of the Retail Study relating to Ponteland and the overall Northumberland administrative area to consider the wider requirements which arise as a consequence of the Garden Village proposal. Our updating of the tables is based on growth Scenario 3 being pursued in practice. Changes from the tables previously presented in Section 2 of this Addendum report are provided in red. The changes are as a result of the additional expenditure arising as a consequence of the Garden Village proposal being added to the expenditure already identified as being claimed by Ponteland and by the wider Northumberland administrative area in the Retail Study. As this Addendum does not seek to provide a comprehensive review of all of the findings of the Retail Study, it has been assumed that the position in respect of commitments is the same as that reported on the Study's publication.

5.02 Table 5.1 updates the convenience goods quantitative need which arises at Ponteland under Scenario 3. It is evident from Table 5.1 that, whilst we envisage that the Garden Village proposal will have some benefit in increasing Ponteland's convenience goods turnover, due to current facilities 'undertrading', an expenditure surplus is not apparent until the last reporting year of 2031. At 2031, a small expenditure surplus of £1.6m is available, which equates to a minimum floorspace requirement of 122 sq.m and a maximum floorspace requirement of 318 sq.m.

Table 5.1: Quantitative Need for Additional Convenience Goods Floorspace in Ponteland under Scenario 3

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min	Max
2015	-3.0	0.0	0.0	-200	-600
2016	-2.8	0.0	0.0	-200	-600
2021	-1.5	0.0	-1.5	-118	-308
2026	0.0	0.0	0.0	-4	-9
2031	1.6	0.0	1.6	122	318

Source: Derived from Table 7.50 of the Northumberland Town Centre and Retail Study Update of March 2016 and Table 5C of Appendix 1 of this Addendum
In 2013 prices

5.03 Table 5.2 updates the convenience goods quantitative need which arises across the Northumberland administrative area at 2031. As a consequence of the additional convenience goods expenditure which we assume would be claimed by Ponteland town centre and at the Garden Village, we estimate that Northumberland will benefit from an additional requirement for convenience goods floorspace at

2021, 2026 and 2031. Table 5.2 indicates that, at 2021, a surplus of £7.7m is apparent, which equates to a minimum floorspace requirement of 628 sq.m and a maximum floorspace requirement of 1,465 sq.m. The expenditure surplus of £42.0m at 2026 equates to a minimum floorspace requirement of 3,321 sq.m and a maximum requirement of 8,232 sq.m, and the surplus of £76.4m at 2031 equates to a minimum requirement of 6,453 sq.m and a maximum requirement of 15,364 sq.m.

Table 5.2: Quantitative Need for Additional Convenience Goods Floorspace in Northumberland under Scenario 3

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2015	-4.1	26.8	-30.8	-2,400	-6,200
2016	2.5	26.7	-24.2	-1,900	-4,900
2021	34.1	26.4	7.7	628	1,465
2026	68.5	26.5	42.0	3,321	8,232
2031	103.1	26.7	76.4	6,453	15,364

Source: Derived from Table 7.5 of the Northumberland Town Centre and Retail Study Update of March 2016 and Tables 5B and 5C of Appendix 1
In 2013 prices

5.04 Turning to comparison goods, Table 5.3 updates the comparison goods quantitative need which arises at Ponteland under Scenario 3. Table 5.3 indicates that an increased expenditure surplus of £0.6m is apparent at 2021, which equates to a minimum floorspace requirement of 103 sq.m and a maximum floorspace requirement of 172 sq.m. The expenditure surplus of £1.6m at 2026 equates to a minimum floorspace requirement of 262 sq.m and a maximum requirement of 437 sq.m, and the surplus of £3.2m at 2031 equates to a minimum requirement of 459 sq.m and a maximum requirement of 765 sq.m.

Table 5.3: Quantitative Need for Additional Comparison Goods Floorspace in Ponteland under Scenario 3

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2011	0.0	0.0	0.0	0	0
2016	0.0	0.0	0.0	0	0
2021	0.6	0.0	0.6	103	172
2026	1.6	0.0	1.6	262	437
2031	3.2	0.0	3.2	459	765

Source: Extracted from Table 7.51 of the Northumberland Town Centre and Retail Study Update of March 2016
[1] Average sales density assumed to be £5,000 per sq.m at 2015
[2] Average sales density assumed to be £3,000 per sq.m at 2015
In 2013 prices

5.05 Table 5.2 updates the comparison goods quantitative need which arises across the Northumberland administrative area at 2031. As a consequence of the additional comparison goods expenditure which we assume would be claimed by Ponteland town centre and at the Garden Village, we estimate that Northumberland will benefit from an additional requirement for comparison goods floorspace at 2021, 2026 and 2031. Table 5.2 indicates that, despite the additional expenditure, existing commitments ensure that there is still an expenditure deficit at 2021. However, the increased expenditure surplus of £57.3m which is evident at 2026 equates to an overall Northumberland minimum floorspace requirement of 9,190 sq.m and a maximum requirement of 15,176 sq.m, and the surplus of £143.5m at 2031 equates to a minimum requirement of 20,591 sq.m and a maximum requirement of 34,065 sq.m.

Table 5.4: Quantitative Need for Additional Comparison Goods Floorspace in Northumberland under Scenario 3

Year	Comparison Goods				
	£m			Floorspace Requirement (Net)	
	Surplus Expenditure	Commitments Turnover	Residual Expenditure	Min[1]	Max[2]
2015	0.0	35.8	-35.8	-7,200	-11,900
2016	2.5	36.6	-34.1	-6,700	-11,100
2021	35.0	40.4	-5.4	-927	-1,602
2026	102.4	45.1	57.3	9,190	15,176
2031	193.8	50.3	143.5	20,591	34,065

Source: Extracted from Table 7.6 of the Northumberland Town Centre and Retail Study Update of March 2016
[1] Average sales density assumed to be £5,000 per sq.m at 2015
[2] Average sales density assumed to be £3,000 per sq.m at 2015
In 2013 prices

5.06 Returning to the Garden Village, our assessment finds that there could be a requirement at 2031 for around 895 sq.m of net convenience goods floorspace and around 380 sq.m of comparison goods floorspace under growth Scenario 3. It should be noted that this does not comprise the entirety of the likely Class A1 retail need as certain retail leisure services (hairdressers, beauticians, dry cleaners and so on) fall within Class A1 but are not accounted for in a quantitative need assessment focused upon convenience and comparison goods retailers.

5.07 In any event, we again reiterate that the Garden Village floorspace requirements identified in this report should not be taken as maximum figures as it could well be the case that additional facilities would allow a greater proportion of expenditure which is generated within the Garden Village to be retained there.

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APPENDIX 1

TABLE 1: POPULATION AND EXPENDITURE (CONVENIENCE)

Scenario	Population				Per Capita Expenditure (Excluding SfT) Convenience (£)						
	2019	2021	2026	2031	2013	2015	2016	2019	2021	2026	2031
1	254	761	1,776	3,044	2,166	2,154	2,157	2,175	2,188	2,256	2,320
2	393	1,180	2,754	4,721	2,166	2,154	2,157	2,175	2,188	2,256	2,320
3	421	1,264	2,950	5,057	2,166	2,154	2,157	2,175	2,188	2,256	2,320

Notes

a. Expenditure data based on Zone 7 post code sectors: NE13 6, NE15 0/9, NE18 0, NE20 0 and NE20 9

b. Population figures derived from Northumberland County Council Delivery Estimates

c. Per capita expenditure at 2013 sourced from Experian G3 Micromarketer (2014 data) and rolled forward to the 2015 base year and each of the forecast years using forecast expenditure growth rates sourced from page 19 of Experian's Retail Planner Briefing Note 12.1

d. Excludes spending on Special Forms of Trading (internet sales/catalogue/mail order) at the rates set out on page 21 of Experian's Retail Planner Briefing Note 12.1

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APPENDIX 1

TABLE 2A: TOTAL CONVENIENCE GOODS AVAILABLE EXPENDITURE

Scenario	Expenditure Convenience			Growth	
	2021 £m	2026 £m	2031 £m	21-'26 £m	26-'31 £m
1	1.7	4.0	7.1	2.3	3.1
2	2.6	6.2	11.0	3.6	4.7
3	2.8	6.7	11.7	3.9	5.1

TABLE 2B: MAIN / TOP-UP SPLIT AT 2031

Scenario	Expenditure								
	2021			2026			2031		
	Main £m	Top-Up £m	Total £m	Main £m	Top-Up £m	Total £m	Main £m	Top-Up £m	Total £m
1	1.2	0.4	1.7	2.9	1.1	4.0	5.2	1.9	7.1
2	1.9	0.7	2.6	4.6	1.7	6.2	8.0	2.9	11.0
3	2.0	0.7	2.8	4.9	1.8	6.7	8.6	3.1	11.7

Notes:

a. Post code sectors: NE13 6, NE15 0/9, NE18 0, NE20 0 and NE20 9

b. Population figures derived from Northumberland County Council Delivery Estimates

c. Per capita expenditure at 2013 sourced from Experian G3 Micromarketer (2014 data) and rolled forward to the 2015 base year and each of the forecast years using forecast expenditure growth rates sourced from page 19 of Experian's Retail Planner Briefing Note 12.1

d. Excludes spending on Special Forms of Trading (internet sales/catalogue/mail order) at the rates set out on page 21 of Experian's Retail Planner Briefing Note 12.1

e. Split between 'main' and 'top up' spend derived from 2015 household survey results for Zone 7

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TABLE 3: SUMMARISED ZONE 7 CONVENIENCE GOODS SHOPPING PATTERNS

Destination	Zone 7 Main Food (%)	 Top Up (%)
Within Study Area		
Zone 7		
Ponteland	20.8	39.7
Other Zone 7, Inside Northumberland County Area	0.0	3.1
Other Zone 7, Outside Northumberland County Area	11.6	14.2
Sub-Total Zone 7	**32.4**	**57.0**
Zone 9		
Hexham	3.9	1.1
Other Zone 9, Inside Northumberland County Area	0.0	1.3
Sub-Total Zone 9	**3.9**	**2.3**
Zone 11		
Cramlington	1.9	1.3
Sub-Total Zone 11	**1.9**	**1.3**
Sub-total Northumberland County Area	**26.6**	**46.3**
Sub-total Study Area	**38.2**	**60.5**
Outside Study Area		
Durham County Council	0.8	0.0
Gateshead Metropolitan Borough Council	5.9	2.3
Newcastle City Council	50.8	27.8
North Tyneside Council	4.4	9.4
Sub-total Outside Study Area	**61.8**	**39.5**
Total	**100.0**	**100.0**

Notes:

a. Market shares derived from Table 3 of Appendix 4 of Northumberland Town Centre and Retail Study Update

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TABLE 4A: ESTIMATED GARDEN VILLAGE 'MAIN FOOD' CONVENIENCE GOODS SHOPPING PATTERNS AND CLAIMED EXPENDITURE

Destination	Market Share (%)	2021 Scenario 1 (£m)	2021 Scenario 2 (£m)	2021 Scenario 3 (£m)	2026 Scenario 1 (£m)	2026 Scenario 2 (£m)	2026 Scenario 3 (£m)	2031 Scenario 1 (£m)	2031 Scenario 2 (£m)	2031 Scenario 3 (£m)
Within Study Area										
Zone 7										
Garden Village	15.0	0.2	0.3	0.3	0.4	0.7	0.7	0.8	1.2	1.3
Ponteland	20.0	0.2	0.4	0.4	0.6	0.9	1.0	1.0	1.6	1.7
Other Zone 7, Inside Northumberland County Area	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Zone 7, Outside Northumberland County Area	10.0	0.1	0.2	0.2	0.3	0.5	0.5	0.5	0.8	0.9
Sub-Total Northumberland County Area	**15.0**	**0.4**	**0.7**	**0.7**	**1.0**	**1.6**	**1.7**	**1.8**	**2.8**	**3.0**
Sub-Total Study Area	**45.0**	**0.5**	**0.9**	**0.9**	**1.3**	**2.0**	**2.2**	**2.3**	**3.6**	**3.9**
Outside Study Area										
Gateshead Metropolitan Borough Council	5.0	0.1	0.1	0.1	0.1	0.2	0.2	0.3	0.4	0.4
Newcastle City Council	50.0	0.6	0.9	1.0	1.5	2.3	2.4	2.6	4.0	4.3
Sub-Total Outside Study Area	**55.0**	**0.7**	**1.0**	**1.1**	**1.6**	**2.5**	**2.7**	**2.8**	**4.4**	**4.7**
Total	**100.0**	**1.2**	**1.9**	**2.0**	**2.9**	**4.6**	**4.9**	**5.2**	**8.0**	**8.6**

TABLE 4B: ESTIMATED GARDEN VILLAGE 'TOP UP' CONVENIENCE GOODS SHOPPING PATTERNS AND CLAIMED EXPENDITURE

Destination	Market Share (%)	2021 Scenario 1 (£m)	2021 Scenario 2 (£m)	2021 Scenario 3 (£m)	2026 Scenario 1 (£m)	2026 Scenario 2 (£m)	2026 Scenario 3 (£m)	2031 Scenario 1 (£m)	2031 Scenario 2 (£m)	2031 Scenario 3 (£m)
Within Study Area										
Zone 7										
Garden Village	100.0	0.4	0.7	0.7	1.1	1.7	1.8	1.9	2.9	3.1
Other Zone 7, Inside Northumberland County Area	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Zone 7, Outside Northumberland County Area	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-Total Northumberland County Area	**100.0**	**0.4**	**0.7**	**0.7**	**1.1**	**1.7**	**1.8**	**1.9**	**2.9**	**3.1**
Sub-Total Study Area	**100.0**	**0.4**	**0.7**	**0.7**	**1.1**	**1.7**	**1.8**	**1.9**	**2.9**	**3.1**
Outside Study Area										
Gateshead Metropolitan Borough Council	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Newcastle City Council	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sub-Total Outside Study Area	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**
Total	**100.0**	**0.4**	**0.7**	**0.7**	**1.1**	**1.7**	**1.8**	**1.9**	**2.9**	**3.1**

Notes:

a. Market shares based on professional judgement

b. Expenditure claimed by each destination estimated by multiplying market share by available expenditure (derived from Table 2B)

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TABLE 5A: ESTIMATED TURNOVER OF A GARDEN VILLAGE CONVENIENCE STORE AT 2021, 2026 AND 2031

Year	Floorspace (sq.m)	Assmed Sales Density (£m per sq.m)	Convenience Store Turnover (£m)
2021	250	9,870	2.5
2026	250	9,919	2.5
2031	250	9,969	2.5

Notes:
a. Assumed floorspace considered to relate to typical convenience grocery store model (allows full Sunday trading)
b. Assumed sales density is mid-point between 'main four' average (£13,018 at 2015 as derived from Verdict 2014) and WYG estimated sales density for smaller convenience store operators (which we assume to be £7,000 per sq.m at 2015)
c. Allowance made for changes in sales efficiency over time in accordance with Figure 4a of Experian Retail Planner Briefing Note 12.1 Addendum

TABLE 5B: GARDEN VILLAGE CONVENIENCE GOODS FLOORSPACE REQUIREMENT AT 2021, 2026 AND 2031

Year	Scenario	Total Available Expenditure (£m)	Convenience Store Requirement (£m)	Surplus Beyond Convenience Store (£m)	Additional Floorspace Requirement (sq.m)
2021	1	0.6	2.5	-1.8	64
	2	1.0	2.5	-1.5	99
	3	1.0	2.5	-1.4	106
2026	1	1.5	2.5	-1.0	152
	2	2.3	2.5	-0.1	236
	3	2.5	2.5	0.0	259
2031	1	2.7	2.5	0.2	306
	2	4.1	2.5	1.6	797
	3	4.4	2.5	1.9	895

Notes:
a. It is assumed that the first 250 sq.m of floorspace will come forward in the form of a convenience grocery store, which will turnover an estimated £2.5m (based on the above sales densities set out at Table 5A). Accordingly, the first £2.5m secured by the Garden Village is considered on this basis. Any subsequent expenditure is converted into an additional floorspace requirement based on an assumed sales density of £3,000 per sq.m at 2015, which is considered to equate to that achieved by small, speciali
b. Allowance made for changes in sales efficiency over time in accordance with Figure 4a of Experian Retail Planner Briefing Note 12.1 Addendum

TABLE 5C: ADDITIONAL CONVENIENCE GOODS FLOORSPACE SUPPORTED IN PONTELAND AT 2021, 2026 AND 2031

Year	Scenario	Available Expenditure (£m)	Min Floorspace (sq.m)	Max Floorspace (sq.m)
2021	1	0.2	19	50
	2	0.4	30	77
	3	0.4	32	82
2026	1	0.6	46	119
	2	0.9	71	184
	3	1.0	76	197
2031	1	1.0	80	208
	2	1.6	124	323
	3	1.7	133	346

Notes:
a. Maximum floorspace requirement based on assumed sales density of £5,000 per sq.m at 2015 (equates to £4,980 per sq.m at 2031)
b. Minimum floorspace requirement based on assumed sales density of £13,018 per sq.m (the average of the 'main four' operators as identified by Verdict 2014) at 2015
c. Allowance made for changes in sales efficiency over time in accordance with Figure 4a of Experian Retail Planner Briefing Note 12.1 Addendum

TABLE 5D: ADDITIONAL CONVENIENCE GOODS FLOORSPACE SUPPORTED IN NORTHUMBERLAND AT 2021, 2026 AND 2031

Year	Scenario	Available Expenditure (£m)	Min Floorspace (sq.m)	Max Floorspace (sq.m)
2021	1	0.9	83	113
	2	1.4	128	175
	3	1.4	137	188
2026	1	2.1	198	271
	2	3.3	307	420
	3	3.5	335	456
2031	1	3.7	386	514
	2	5.7	921	1,119
	3	6.1	1,028	1,241

Notes:
a. Derived from Tables 5C and 5D

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TABLE 6: POPULATION AND EXPENDITURE (COMPARISON)

Scenario	Population				Per Capita Expenditure (Excluding SfT) Comparison (£)						
	2019	2021	2026	2031	2013	2015	2016	2019	2021	2026	2031
1	254	761	1,776	3,044	3,646	3,958	4,044	4,562	4,562	5,367	6,338
2	393	1,180	2,754	4,721	3,646	3,958	4,044	4,562	4,562	5,367	6,338
3	421	1,264	2,950	5,057	3,646	3,958	4,044	4,562	4,562	5,367	6,338

Notes

a. Expenditure data based on Zone 7 post code sectors: NE13 6, NE15 0/9, NE18 0, NE20 0 and NE20 9

b. Population figures derived from Northumberland County Council Delivery Estimates

c. Per capita expenditure at 2013 sourced from Experian G3 Micromarketer (2014 data) and rolled forward to the 2015 base year and each of the forecast years using forecast expenditure growth rates sourced from page 19 of Experian's Retail Planner Briefing Note 12.1

d. Excludes spending on Special Forms of Trading (internet sales/catalogue/mail order) at the rates set out on page 21 of Experian's Retail Planner Briefing Note 12.1

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TABLE 7: TOTAL COMPARISON GOODS AVAILABLE EXPENDITURE

Scenario	Expenditure Comparison			Growth	
	2021 £m	2026 £m	2031 £m	21-'26 £m	26-'31 £m
1	3.5	9.5	19.3	6.1	9.8
2	5.4	14.8	29.9	9.4	15.1
3	5.8	15.8	32.1	10.1	16.2

Notes

a. Expenditure data based on Zone 7 post code sectors: NE13 6, NE15 0/9, NE18 0, NE20 0 and NE20 9

b. Population figures derived from Northumberland County Council Delivery Estimates

c. Per capita expenditure at 2013 sourced from Experian G3 Micromarketer (2014 data) and rolled forward to the 2015 base year and each of the forecast years using forecast expenditure growth rates sourced from page 19 of Experian's Retail Planner Briefing Note 12.1

d. Excludes spending on Special Forms of Trading (internet sales/catalogue/mail order) at the rates set out on page 21 of Experian's Retail Planner Briefing Note 12.1

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TABLE 8: SUMMARISED ZONE 7 COMPARISON GOODS SHOPPING PATTERNS

Destination	Zone 7 All Comparison (%)
Within Study Area	
Zone 3	
Scots Gap	0.4
Sub-Total Zone 7	**0.4**
Zone 7	
Ponteland	4.2
Other Zone 7, Inside Northumberland County Area	0.6
Other Zone 7, Outside Northumberland County Area	0.9
Sub-Total Zone 7	**5.7**
Zone 8	
Prudhoe	0.3
Other Zone 7, Inside Northumberland County Area	0.3
Sub-Total Zone 8	**0.6**
Zone 9	
Hexham	2.8
Other Zone 9, Inside Northumberland County Area	0.4
Sub-Total Zone 9	**3.2**
Zone 11	
Cramlington	1.5
Sub-Total Zone 11	**1.5**
Zone 13	
Morpeth	0.3
Sub-Total Zone 13	**0.3**
Zone 14	
Ashington	0.0
Sub-Total Zone 14	**0.0**
Sub-total Northumberland County Area	**10.9**
Sub-total Study Area	**11.8**
Outside Study Area	
Gateshead Metropolitan Borough Council	21.9
Newcastle City Council	59.0
North Tyneside Council	5.5
Other	1.8
Sub-total Outside Study Area	**88.2**
Total	**100.0**

Notes:

a. Market shares derived from Table 30 of Appendix 5 of Northumberland Town Centre and Retail Study Update

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TABLE 9: ESTIMATED GARDEN VILLAGE COMPARISON GOODS SHOPPING PATTERNS

Destination	Market Share (%)	2021			2021			2021		
		Scenario 1 (£m)	Scenario 2 (£m)	Scenario 3 (£m)	Scenario 1 (£m)	Scenario 2 (£m)	Scenario 3 (£m)	Scenario 1 (£m)	Scenario 2 (£m)	Scenario 3 (£m)
Within Study Area										
Zone 7										
Garden Village	5.0	0.2	0.3	0.3	0.5	0.7	0.8	1.0	1.5	1.6
Ponteland	5.0	0.2	0.3	0.3	0.5	0.7	0.8	1.0	1.5	1.6
Other Zone 7, Outside Northumberland County Area	1.0	0.0	0.1	0.1	0.1	0.1	0.2	0.2	0.3	0.3
Sub-Total Zone 7	**11.0**	**0.4**	**0.6**	**0.6**	**1.0**	**1.6**	**1.7**	**2.1**	**3.3**	**3.5**
Sub-total Northumberland County Area	**10.0**	**0.3**	**0.5**	**0.6**	**1.0**	**1.5**	**1.6**	**1.9**	**3.0**	**3.2**
Sub-total Study Area	**11.0**	**0.4**	**0.6**	**0.6**	**1.0**	**1.6**	**1.7**	**2.1**	**3.3**	**3.5**
Outside Study Area										
Gateshead Metropolitan Borough Council	20.0	0.7	1.1	1.2	1.9	3.0	3.2	3.9	6.0	6.4
Newcastle City Council	60.0	2.1	3.2	3.5	5.7	8.9	9.5	11.6	18.0	19.2
North Tyneside Council	5.0	0.2	0.3	0.3	0.5	0.7	0.8	1.0	1.5	1.6
Other	4.0	0.1	0.2	0.2	0.4	0.6	0.6	0.8	1.2	1.3
Sub-total Outside Study Area	**89.0**	**3.1**	**4.8**	**5.1**	**8.5**	**13.2**	**14.1**	**17.2**	**26.6**	**28.5**
Total	**100.0**	**3.5**	**5.4**	**5.8**	**9.5**	**14.8**	**15.8**	**19.3**	**29.9**	**32.1**

Notes:

a. Market shares based on professional judgement

b. Expenditure claimed by each destination estimated by multiplying market share by available expenditure (derived from Table 7)

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TABLE 10A: ADDITIONAL COMPARISON GOODS FLOORSPACE SUPPORTED IN GARDEN VILLAGE

Year	Scenario	Available Expenditure (£m)	Floorspace Requirement (sq.m)
2021	1	0.2	51
	2	0.3	79
	3	0.3	85
2026	1	0.5	126
	2	0.7	196
	3	0.8	210
2031	1	1.0	229
	2	1.5	355
	3	1.6	380

Notes:

a. Assumed sales density for comparison goods surplus is WYG estimate for small, independent comparison goods retailers (£3,000 per sq.m at 2015)

b. Allowance made for changes in sales efficiency over time in accordance with Figure 4b of Experian Retail Planner Briefing Note 12.1 Addendum

TABLE 10B: ADDITIONAL COMPARISON GOODS FLOORSPACE SUPPORTED IN PONTELAND

Year	Scenario	Available Expenditure (£m)	Min Floorspace (sq.m)	Max Floorspace (sq.m)
2021	1	0.2	31	51
	2	0.3	48	79
	3	0.3	51	85
2026	1	0.5	76	126
	2	0.7	117	196
	3	0.8	126	210
2031	1	1.0	137	229
	2	1.5	213	355
	3	1.6	228	380

Notes:

a. Maximum floorspace requirement based on assumed sales density of £3,000 per sq.m at 2015

b. Minimum floorspace requirement based on assumed sales density of £5,000 per sq.m at 2015

b. Allowance made for changes in sales efficiency over time in accordance with Figure 4b of Experian Retail Planner Briefing Note 12.1 Addendum

TABLE 10C: ADDITIONAL COMPARISON GOODS FLOORSPACE SUPPORTED IN NORTHUMBERLAND

Year	Scenario	Available Expenditure (£m)	Min Floorspace (sq.m)	Max Floorspace (sq.m)
2021	1	0.3	82	102
	2	0.5	127	159
	3	0.6	136	170
2026	1	1.0	202	252
	2	1.5	313	391
	3	1.6	335	419
2031	1	1.9	366	458
	2	3.0	568	710
	3	3.2	609	761

Notes:

a. Derived from Tables 11A and 11B

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